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**E L M H U R S T P A R K D I S T R I C T**  
**B O A R D O F P A R K C O M M I S S I O N E R S**  
**M E M O R A N D U M**

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**DATE:** April 10, 2017

**TO:** Board of Park Commissioners 

**FROM:** James W. Rogers, Executive Director  
Laura Guttman, Strategy and Planning Coordinator

**RE: 2016 YEAR-END STRATEGIC PLAN PROGRESS REPORT**

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**ISSUE**

The 2016 Year-end Strategic Plan Progress Report (SPPR) provides an overview of staff's progress toward implementing the 2016 Strategic Work Plan initiatives from January 1 to December 31, 2016. Distribution and review of this report is in accordance with Board policies.

**DISCUSSION**

To remain dynamic and responsive to changing needs, a successful strategic planning process requires an ongoing review of actual progress in relation to the goals in the work plan. Therefore, monitoring the plan is necessary to ensure that action is taken and that actual measurable results are achieved as anticipated.

The SPPR is compiled and submitted to the Board bi-annually at mid-year and year-end as an ongoing evaluation of achievement of long-term strategy for decision-making, resource allocation and work plan development. The 2016 Year-end SPPR has the same format and approach as the 2016 Mid-year SPPR and includes the tracking and reporting of new registration and financial measures.

During the April 10, 2017 Board meeting, staff will provide an overview of the SPPR and look forward to the Board's feedback and answering questions. After Board approval, the SPPR will be available on the District's website (epd.org) for public review.

**RECOMMENDATION**

That the Board of Park Commissioners reviews and approves the attached 2016 Year-end Strategic Plan Progress Report.

Thank you.

Attachment: 2016 Year-end Strategic Plan Progress Report

# Elmhurst Park District Strategic Plan 2016 Year-end Progress Report January 1 to December 31

NURTURE COMMUNITY CONNECTIONS → IMPROVE CUSTOMER EXPERIENCE → OPTIMIZE PROGRAM & FACILITY MIX

**CUSTOMER CENTERED**

**VISION STATEMENT**  
We aspire to be a customer centered organization through innovation and sustainability.

**MISSION STATEMENT**  
We provide experiences for the lifetime enjoyment of people who live and play in Elmhurst.

**ELMHURST PARK DISTRICT**

**STRATEGIC PLAN**

**CONTINUOUS IMPROVEMENT THROUGH AN EMPOWERED TEAM**  
DEVELOP AN EMPOWERED STAFF → CREATE A CULTURE OF CONTINUOUS IMPROVEMENT → FOSTER A CULTURE OF INNOVATION

**IMPROVEMENT THROUGH COLLABORATION & INNOVATION**

**FISCAL AGILITY**

CREATE A BORDERLESS ORGANIZATION → EXCELLENCE IN INNOVATIVE OPERATIONAL MANAGEMENT

ALIGN RESOURCES WITH COMMUNITY NEED → TAKE CARE OF WHAT WE HAVE → INVEST IN THE FUTURE



# 2016 Year-end Strategic Plan Progress Report

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## Executive Director's Message

I am pleased to present the Elmhurst Park District's fourth Year-end Strategic Plan Progress Report (SPPR). This report is staff's method of demonstrating accountability with how we are taking action and achieving results to effectively implement your Strategic Plan. Our goal has been to provide the Board and community a readable and understandable report that monitors long-term strategy so the Strategic Plan remains a useful and relevant tool for future planning.

The SPPR is compiled and submitted to the Board bi-annually at mid-year and year-end, and after Board approval, it is available on the District's website (epd.org) for public review. The 2016 Year-end SPPR has the same format and approach as the 2015 Year-end SPPR and includes the tracking and performance reporting of new registration and financial performance measures.

As District staff is fully engaged with the Strategic Plan, this report illustrates how your vision for 2016 was executed and will drive the last year of this Strategic Plan. It continues to evolve based on your feedback and our ongoing implementation of the Plan. For example, due to changing District priorities over the first three-years of the Plan, staff recommended, and the Board approved, an updated 2016 Strategic Work Plan (SWP) on April 27, 2016 so that it continued to be realistic for work planning and decision-making in the final two years of the Plan. By focusing on addressing the highest priorities identified during SWP review in April, the Board can be assured that its long-term strategy (which are the Strategic Themes and Objectives listed on the District's Strategy Map on page 8) is being addressed as reflected in this report.

On behalf of the staff, we appreciate your continued support and involvement in shaping the District's future.

Thank you,



James W. Rogers  
Executive Director



# 2016 Year-end Strategic Plan Progress Report

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## Introduction and Overview

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# 2016 Year-end Strategic Plan Progress Report

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## **Why do Strategic Planning?**

If our Mission and Vision Statements are to have any meaning, they must be accompanied by deliberate planning efforts to move the organization and the community toward a desired future. This requires clearly defined goals, actionable objectives, committed leadership and effective management. Above all, it requires managing the forces of change. Those forces include community demographics, fiscal constraints, government mandates, economic conditions, emerging technologies and many other influences on our operations. High performing organizations are those that learn to anticipate and adapt to change. The best tool for accomplishing these objectives is strategic planning.

Along with utilizing community input, multiple levels of staff were engaged in providing feedback and developing strategy throughout the 2013-17 Strategic Planning process, which has and will create a greater awareness and ownership of the Strategic Plan. Staff continue to be involved in implementing the Plan to ensure that Department initiatives and budget proposals reflect the necessary steps and resources for addressing the Board's priorities. The Board and staffs' ongoing review of the Plan sustains its integrity and relevancy over time and facilitates the District's responsiveness to the community's needs as Elmhurst grows and changes.

Furthermore, for strategic planning to be effective and dynamic, District staff continually measure and assess performance. To evaluate achievement of the Strategic Plan priorities, staff compiles the Strategic Plan Progress Report (SPPR) to provide a snapshot of progress toward addressing and achieving the District's 2016 Strategic Work Plan from January 1 to December 31. This Year-end report along with the Mid-year SPPR assist the Board and staff with a continued evaluation of achievement of long-term strategy for decision-making, resource allocation and work plan development. Our ultimate goal is to ensure that we are providing experiences for the lifetime enjoyment of people who live and play in our community.

## **Understanding the Strategic Plan Progress Report**

This SPPR provides an evaluation of the District's year-end progress toward accomplishing the 2016 Strategic Work Plan, which is available on the District's website and in Attachment A of this report. This report begins with an overview of the process used in 2012 to develop the 2013-17 Strategic Plan along with an explanation of the Balanced Scorecard Framework, the tool utilized to define the District's strategy. The introductory sections provide the District's mission and vision statements and the overall five-year strategy approved by the Board along with overviews of the 2016 Strategic Work Plan (SWP). The main body of the report is organized by the Strategic Themes approved by the Board and includes a qualitative status report on addressing SWP initiatives and then an analysis of performance measure outcomes to monitor accomplishment of this strategy. At the end of the report is a list of key terms and their definitions to provide clarity to the District's Strategic Plan terminology.



## District Strategy

# What Do We Need to Accomplish?

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This section provides an overview of the District's 2013-17 Strategic Plan strategy and the 2016 Strategic Work Plan for implementing this strategy.

## Strategic Plan Process and Balanced Scorecard Framework

Since 1992, the Elmhurst Park District has committed to developing and implementing a Strategic Plan, and in August 2012, the Board approved the District's fifth Plan. The Plan assists the Board and staff with anticipating future community desires and needs along with clarifying organizational direction for decision making. Since its inception, the Board and staff have selected and implemented projects, programs and initiatives based upon the priorities articulated in the Plan.

To develop the Plan, the Board and staff reviewed the 2011 Customer Attitude and Interest Survey, District long-range planning documents, performance reports and employee feedback to gain an understanding of the current operating environment and future needs. To more accurately define our business purpose and vision for the future, the Board and staff also reviewed and reworded the District's **mission** and **vision** statements.

After revising the mission and vision statements, the Board and staff participated in a workshop to identify key organizational strengths, weaknesses, opportunities and threats and brainstormed the key focus areas for the next three to five years. These key focus areas were then built into a foundation for the development of **strategic themes** based on the Balanced Scorecard, a strategic planning and management framework used to align business operations with vision and strategy, communicate strategy internally and externally and monitor organizational performance against strategic objectives. It emphasizes the cause and effect relationships among distinct yet interrelated perspectives: customer needs, financial performance, internal support processes and organizational learning and growth.

To further define what the District must accomplish to execute its themes, the staff developed and the Board approved **strategic objectives**. Based on the **objectives**, staff developed **initiatives** (specific activities, projects and actions to be taken) with two- to five-year assigned timelines and key performance measures to allow for ongoing tracking of progress. Furthermore, each year, staff reviews and develops detailed action steps, or **tactics**, which ensure the completion of the strategic initiatives by focusing decision making and the allocation of resources on implementation of District strategy.





## Mission, Vision and District Strategy

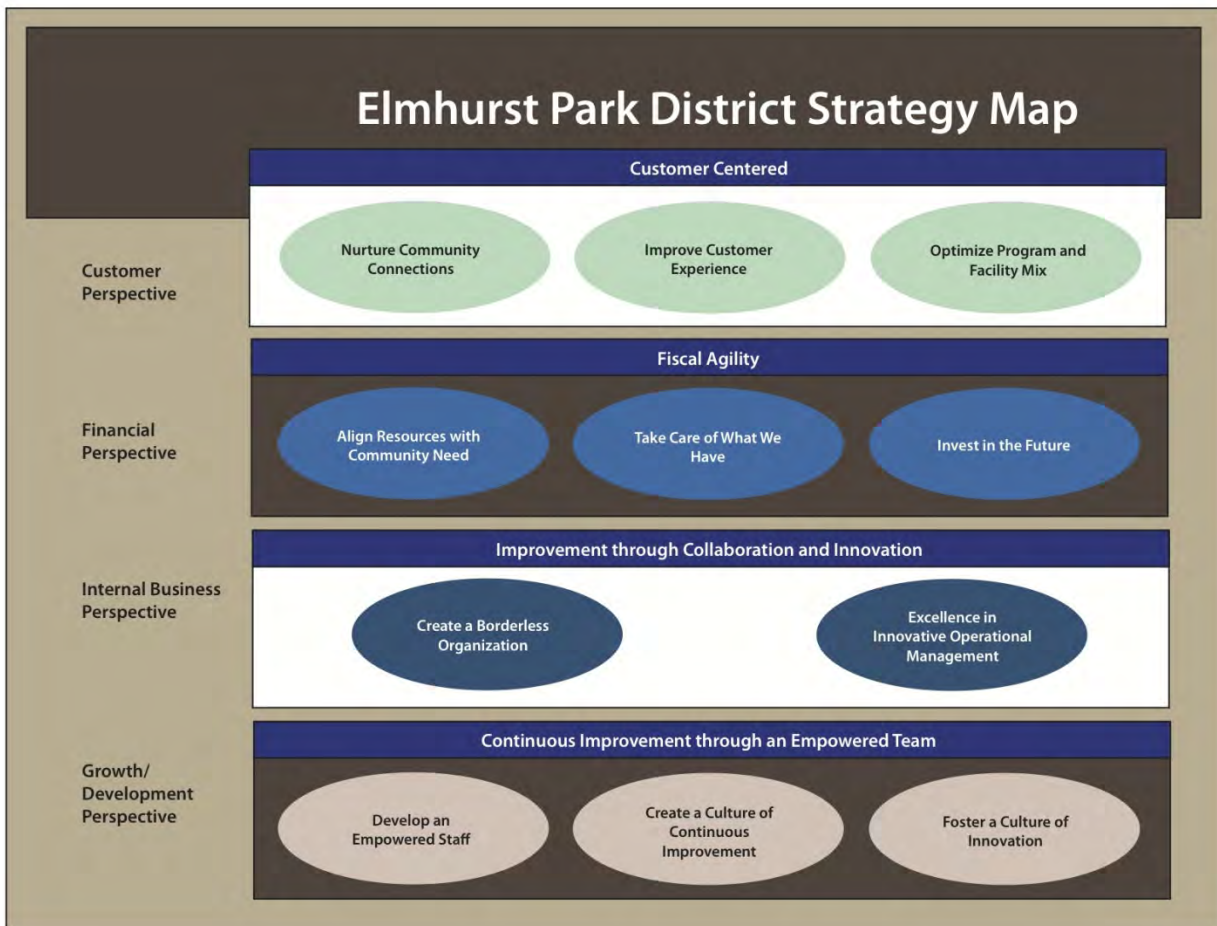
As described on the previous page, all of the District's Strategic Themes and Objectives are aligned with the District's Mission and Vision and the four Balanced Scorecard perspectives as represented on the Strategy Map below. The Map lists the four perspectives on the left side and the supporting Themes and Objectives adjacent to the list of perspectives. Refer to pages 11-30 for the District's definition of each Theme and Objective.

### Mission Statement

*We provide experiences for the lifetime enjoyment of people who live and play in our community.*

### Vision Statement

*We aspire to be a customer centered organization through innovation and sustainability.*

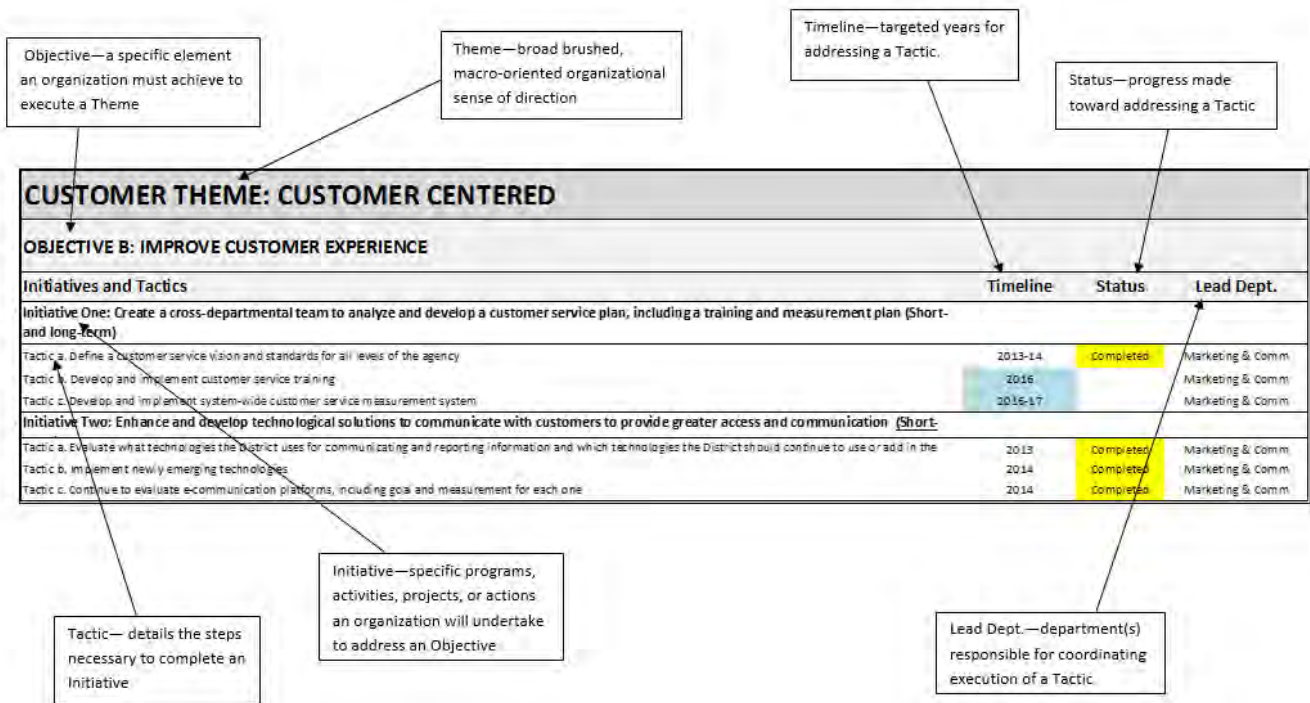


# 2016 Year-end Strategic Plan Progress Report

## Strategic Work Plan Initiatives and Tactics

Developed by staff and approved by the Board annually, the 2016 Strategic Work Plan (SWP) in Attachment A outlines the specific broad goals (initiatives) and tasks (tactics) which will be implemented to address District strategy. To allow for focused direction and concise tracking of this strategy, the SWP includes all initiatives during the five-year duration of the Strategic Plan. Since long-range strategy takes time to address, the implementation of each of the initiatives is over a two- to three-year period unless it will occur during all five years of the Plan. Therefore, the timing of initiatives is defined as follows: short-term (2013-15); mid-term (2014-16); long-term (2015-17) and continuous (2013-17). To foster additional accountability, the SWP also includes the lead staff position and/or team responsible along with the targeted deadline for completing each tactic. The SWP format is illustrated at the bottom of this page.

Moreover, the SWP includes initiatives and tactics that relate to planning, acting and evaluating. Planning relates to the District's ability to plan the future and involves gathering of information and conducting an assessment before taking action and making changes (e.g., program plan, staffing study). While these initiatives can be challenging to measure quantitatively, they are important because they lay the foundation for the District's future success. Acting initiatives relate to the District's ability to meet desired operations and service levels. They often involve implementing elements from the planning phase. These activities are important because they have tremendous impact on whether tasks or projects will have successful outcomes (e.g., process improvements, new fee structures). Evaluating initiatives relate to the effectiveness of both our planning and actions. These initiatives are important because they let us know whether our planning and actions are producing the desired outcomes (e.g., gather internal customer feedback). On pages 11-30, staff provide status reports regarding implementation of 2016 SWP.



CUSTOMER THEME: CUSTOMER CENTERED			
OBJECTIVE B: IMPROVE CUSTOMER EXPERIENCE			
Initiatives and Tactics	Timeline	Status	Lead Dept.
<b>Initiative One: Create a cross-departmental team to analyze and develop a customer service plan, including a training and measurement plan (Short- and long-term)</b>			
Tactic a. Define a customer service vision and standards for all levels of the agency	2013-14	Completed	Marketing & Comm.
Tactic b. Develop and implement customer service training	2016		Marketing & Comm.
Tactic c. Develop and implement system-wide customer service measurement system	2015-17		Marketing & Comm.
<b>Initiative Two: Enhance and develop technological solutions to communicate with customers to provide greater access and communication (Short-term)</b>			
Tactic a. Evaluate what technologies the District uses for communicating and reporting information and which technologies the District should continue to use or add in the	2013	Completed	Marketing & Comm.
Tactic b. Implement newly emerging technologies	2014	Completed	Marketing & Comm.
Tactic c. Continue to evaluate e-communication platforms, including goal and measurement for each one	2014	Completed	Marketing & Comm.



## Strategic Work Plan Progress How Are We Doing?

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This section provides the definition of each Strategic Theme and its related Objectives along with a listing of the initiatives in the 2016 Strategic Work Plan (SWP). For initiatives scheduled to begin prior to year-end 2016, staff describes the status of work completed to date and future plans for accomplishing those initiatives. Following the status reports, staff summarize the performance measure outcomes, which track accomplishment of District strategy.

## Customer Centered Theme

**About this Theme:** Customers are defined as resident and business taxpayers, resident and non-resident users of services, and partners. Elements of the theme include engaging customers for long-term marketplace success through listening to the voice of the customer, building relationships, and using customer knowledge to improve services. This customer-focused structure puts customers' needs at the center of decision making.

### **Objective A: Nurture Community Connections**

**About this Objective:** The District will continue its strong orientation toward community connections and partnership development. This will also assist in augmenting service delivery. Important to this objective will be identifying the goals, costs, and benefits of existing and future partnerships and to evaluate their effectiveness.

- **Initiative One:** Create process for reviewing existing and potential partnerships according to established criteria (mid- and long- term: 2014-17).

**Year-end Status Update:** In 2015, staff continued working on identifying and defining types of District partners (e.g., affiliate groups, independent contractor, facility use, programming, etc.) and compiling a comprehensive list of all District partnerships. Staff also researched decision making and evaluation tools for potential and existing partnerships. In 2016, the Management Team decided to postpone the review of these tools to 2017 to complete higher priority strategic plan initiatives.

- **Initiative Two:** Develop, nurture and evaluate existing affiliates and partnerships (continuous: 2013-17).

**Year-end Status Update:** In 2016, the District continued nurturing and evaluating existing and potential partnership agreements as described in other Year-end status updates in this Report, including working with the City of Elmhurst on agreements related to its request to use of District property for stormwater management and with District stakeholders and affiliate groups to gather feedback for the Indoor Sports Facility Study and Vision 2020 process (to update the District's strategic and comprehensive plans).

## 2016 Year-end Strategic Plan Progress Report

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- **Initiative Three:** Develop and identify new opportunities based on Strategic Plan, Program Plan and facility needs (mid- and long-term: 2014-17).

**Year-end Status Update:** In March 23, 2016, the Park Board approved the expenditure to hire Conventions, Sports, and Leisure International (CSL), to conduct an Indoor Sports Facility Market Analysis and Financial Feasibility Study (jointly with the City of Elmhurst) to assess the viability of developing and operating an indoor sports facility with aquatics, gymnasiums, turf and ice. Staff addressed Initiatives Three during implementation of the first phase of the Study, which consisted of stakeholder interviews and meetings with many of the District's affiliates and partners, including the Elmhurst Chamber of Commerce, Elmhurst College, DuPage Convention and Visitors Bureau, Edwards-Elmhurst Health, District 205, Immaculate Conception Schools, and YMCA along with local baseball/softball, football, swim team, hockey, soccer, lacrosse, volleyball and basketball groups. In total, thirty-seven (37) individuals representing twenty-two (22) organizations and institutions attended these meetings (11 meetings overall). One of the purposes of these meetings was to identify potential partners for indoor sport athletic facilities.

In addition, to gather additional feedback from the affiliate group stakeholders and the community, CSL conducted a voluntary, non-scientific online survey in late-June to mid-July via a web link, which included questions on the respondent's use of these types of facilities in and outside of Elmhurst, his/her level of interest in new indoor sports facilities in Elmhurst, and the types of funding that he/she would support to fund this type of facility (e.g. property taxes, user fees, and tournament rental revenue).

The results of the meetings and survey were utilized to develop the Study outcomes and were summarized in CSL's final report. CSL presented its findings and report to the Park Board and the City's Development, Planning and Zoning (DPZ) Committee at the October 11, 2016 Board meeting. The report included an overview of stakeholder/partner needs for indoor facility space and both the Board and DPZ Committee acknowledged at the meeting the importance of continuing discussions with potential partners to assist with determining the viability and feasibility of a new indoor sports facility.

### **Objective B: Improve Customer Experience**

**About this Objective:** An important element in operational excellence includes the ability to improve the customer experience. Building a systems approach to service delivery will be achieved through a cross-functional service team. This includes development of standards, implementing District-wide service training, knowledge of customers, and measuring customer satisfaction.

- **Initiative One:** Create a cross-departmental team to analyze and develop a customer service plan, including a training and measurement plan (short- and long-term: 2013-14 and 2016-17).



## 2016 Year-end Strategic Plan Progress Report

**Year-end Status Update:** In 2013, staff formed a cross-departmental Customer Service Team of ten (10) full-time employees, which met bimonthly for four months and identified key characteristics of people and companies that provide great service, developed a customer service vision statement (a credo to our customers) and broad-based standards of service for all employees, and defined the next steps to improve customer service.

In the third quarter of 2013, the Customer Service Team's outcomes were shared with the Management Team. During 2014 to 2016, other District priorities such as the implementation of the new registration system have required staff time to be focused on training and understanding the new system and providing customer service to system users. Therefore, further implementation of the Customer Service initiative has been deferred. However, in 2016, staff did survey Courts Plus members and Pool Pass holders to gather feedback and implement improvements to enhance the customer experience at both those facilities. In 2017, staff will also research and evaluate options and related software to gather, track and report customer feedback on a more consistent basis.

- **Initiative Two:** Enhance and develop technological solutions to communicate with customers to provide greater access and communication (short-term: 2013-15). *This initiative was completed in 2015.*

### **Objective C: Optimize Program and Facility Mix**

**About this Objective:** The District wants to ensure the delivery of the “right” array of services and programs. The “right” array is determined by matching customer needs, demand, marketplace trends and District capabilities. This also includes reviewing service and facility offerings to optimize facility space.

- **Initiative One:** Develop a District Program Plan (short-term: 2013-15). *This initiative was completed in 2015.*
- **Initiative Two:** Develop a process to best position core services in the marketplace (mid-term: 2014-15). *This initiative was completed in 2015.*
- **Initiative Three:** Create a process for review of the external market to determine duplication, opportunities, needs, pricing, etc. (mid-term: 2014-15). *This initiative was completed in 2015.*

## 2016 Year-end Strategic Plan Progress Report

### ➤ **Initiative Four:** Optimize Current and Future Facility Space (continuous: 2013-17).

**Year-end Status Update:** The top priorities for addressing this initiative include stormwater negotiations with the City, the Indoor Sports Facility Study, and Vision 2020 process to update the comprehensive and strategic plans.

**Stormwater:** Significant negotiations continued with the City of Elmhurst during the first half of 2016 concerning its request to utilize multiple park properties for stormwater retention. Following the Park Board's December 16, 2015 approval of an Intergovernmental Agreement (IGA) allowing for the construction of a twelve (12) acre foot detention basin in York Commons with a shutoff valve in exchange for a 72-year extension of the lease of the City's Maintenance Facility for use by the District, staff reviewed and refined multiple drafts of the final design plans for the site along with the Board's subcommittee and the District's engineering firm, V3. Following approval of the final design plans by the District last summer, the City began construction on the detention basin at York Commons, and it is expected to be functional in spring 2017.

Concurrently, consensus was reached regarding a plan for Golden Meadows in which the District will deed the western portion of the site to the City for use as stormwater detention and, in exchange, the City will compensate the District for the value of the site, to a maximum of one and one-half times its appraised value, so that replacement property can be purchased in accordance with Illinois Department of Natural Resources (IDNR) open space land acquisition grant requirements. Following receipt of approval from IDNR to deed over the west portion of the park to the City in exchange for the appraised value, the Board approved an Intergovernmental Agreement (IGA) at the July 25, 2016 Board meeting by a unanimous vote of 6-0 with 1 absence. Shortly thereafter, a property appraiser was sought by the District and City to determine the value of the property per terms of the IGA.

Lastly, the Board's subcommittee reiterated the Board's position regarding the other three parks under consideration (East End, Crestview and Wild Meadows Trace) that the Park Board is not interested in encumbering additional open space with detention basins to provide relief for approximately eleven (11) remaining homes that would be impacted without first discussing alternative ideas for the sites, similar to those the City has already utilized in other locations. Thus far, the City has not indicated an interest in having those discussions.

With the District's responses to the City's stormwater requests provided, and formal agreements reached where possible, this Strategic Plan tactic has been addressed and will be part of the Board's ongoing work plan in 2017.

**Indoor Sports Facility Market Analysis and Financial Feasibility Study:** As noted on page 12, on March 23, 2016, the Board approved the expenditure to hire Conventions, Sports, and Leisure International (CSL), to conduct an Indoor Sports Facility Market Analysis and Financial Feasibility Study jointly with the City of Elmhurst. The District and City underwent a qualifications based selection process to select CSL as the best firm to perform the work.

The primary purpose of this study was to assess the viability of developing and operating a potential new indoor sports facility with aquatics, gymnasium space, indoor turf and indoor ice



## 2016 Year-end Strategic Plan Progress Report

through a comprehensive market and financial analysis and feasibility study. The study involved the following steps:

- assessing market conditions that may have an impact on potential facility use and total revenue and operational costs along with information regarding current trends for indoor sports facilities in the area, the demographics of the area, inventory of other similar facilities, and potential economic impact of the facility in the community.
- based on the market analysis, analyzing different facility business and operating models to assess the best fit for the market and to recommend models that provide for the highest and best use and return on investment.
- making recommendations based on this assessment regarding what facility uses would be financially viable for the District and City to pursue.

The project was kicked-off on May 12, 2016 with CSL meeting with District and City staff to finalize the project timeline, scope of work and data collection needs and taking a tour of the community. On May 12 and 13, CSL also started sports facility stakeholder and staff interviews to gather feedback on current and potential sports facility use. As noted on page 12, CSL met with additional stakeholders in June to gain a comprehensive understanding of the local market and potential use of an aquatic, gymnasium, turf and ice facility along with conducting a community survey from late-June to mid-July.

To collect the data necessary for the market analysis besides the stakeholder meetings and community survey, CSL also compiled the following:

- inventoried other competitive/regional sports facilities and followed up with each one to gather comprehensive event space information and other information the facilities were willing to share on event activity/usage levels, rental rates and financial operations.
- identified a list of comparable national facilities from each of the four different facility types and available space, event, financial, and demographic data from each.
- surveyed local, regional, state and national tournament/competition organizers among users of each of the four different types of facilities.

The results of the market and financial feasibility analysis were utilized to develop the study outcomes as summarized in CSL's final report. CSL presented its findings and report to the Park Board and the City's Development, Planning and Zoning (DPZ) Committee at the October 11, 2016 Board meeting. The report included an overview of stakeholder/partner needs for indoor facility space and at the meeting, both Board and DPZ Committee acknowledged the demand for increased indoor facility use and agreed that given the size of the potential capital investment and questions over funding, further consideration was needed to move forward. The Board had a follow-up discussion at its October 24, 2016 meeting on the next steps for determining the viability and financial feasibility of a new facility, including surveying the level of support and willingness to pay for a facility in the Community Needs Assessment survey and beginning discussions with potential partners.



## 2016 Year-end Strategic Plan Progress Report

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In 2017, as part of the Vision 2020 process, the outcomes of this study along with the results of the Vision 2020 needs assessment and community needs assessment survey will be utilized to develop long-range facility priorities for the District.

**Vision 2020 Process:** The Board conducted its last comprehensive planning process in 2005-07, community survey in 2011 and strategic planning process in 2012. On June 8, 2016, the Board approved undergoing a joint comprehensive and strategic planning process in 2016-17 to determine District priorities for the next three to five years (named the Vision 2020 process). Following Board approval and to conduct a qualifications based selection process, staff developed, posted online and in a legal advertisement, and distributed a Request for Proposal (RFP) to solicit proposals from qualified professional services firms. The District received six (6) proposals, and after the Selection Committee met and discussed which firms satisfactorily met the criteria outlined in the RFP, the Committee agreed that four (4) firms should continue in the selection process. The Committee interviewed those firms on August 15 and 16, 2016 and based on the interviews, two (2) firms stood out as offering processes and a project team that have the experience to perform the work; possess an understanding of and could meet the goals of the project; and will foster a high level of community, Board and staff engagement throughout the process.

At its August 22, 2016 meeting, the Board interviewed the two staff recommended firms and selected The Lakota Group as the preferred firm to conduct the Vision 2020 process. After staff negotiated with the firm to reach an agreement on an appropriate fee for the project, the Board approved the project expense at the September 12, 2016 Board meeting.

At the end of 2016, project work completed to date included the following:

- Held a kick-off meeting and tour with the project team led by The Lakota Group to confirm project goals, timelines and expectations and data collection needs;
- Launched a project website (created and maintained by PROS Consulting the firm leading the Strategic Planning portion of the process);
- Submitted to the project team the requested documents and data necessary to conduct the planning process (e.g. GIS maps, program, financial, planning, marketing documents/data, etc.);
- Held an Open House on October 19, 2016, providing the community the opportunity to learn about the process and additional ways to be involved and provide feedback on the future of District parks, facilities and programs (facilitated by The Lakota Group with 15 individuals participating);
- Held interviews and focus groups with individuals representing various community groups, public organizations, educational institutions, sports groups, etc. (facilitated by The Lakota Group; 34 individuals participated from 27 organizations);
- Interviewed Park Board Commissioners (facilitated by The Lakota Group);
- At October 24, 2016 Board meeting, reviewed the project milestones completed, project timeline and draft community needs assessment survey (presented by The Lakota Group);
- Conducted a community needs assessment survey (overseen by the survey firm, ETC) and received a total 328 completed statistically valid mailed surveys, which was three (3) above the goal of 325; 374 individuals completed the non-statistically valid survey online;

## 2016 Year-end Strategic Plan Progress Report

- Distributed an anonymous Organizational Culture web survey (via PROS Consulting), which provided full- and part-time and seasonal employees the opportunity to submit feedback on the District's organizational/work culture; completed by 170 employees;
- Held seven full-time staff meetings and eight interviews with the management team to gather ideas and aspirations for the next five-years (facilitated by The Lakota Group); ninety-three percent (93%) of full-time staff were able to attend a meeting/interview and all full-time staff were sent a follow-up questionnaire to provide the opportunity to submit additional feedback or feedback if they could not attend a meeting;
- Completed the majority of the park assessment work, including on-site visits (The Lakota Group and Recreation Results) and all the facility assessment tours (Dewberry Architects); and
- Finished (The Lakota Group) the preliminary draft State of the Park District report, including the District profile, Engagement Phase feedback summary and analysis of the regional and local context.

### Fiscal Agility Theme

**About this Theme:** This theme suggests the District's ability to respond nimbly and quickly to ever changing business demands, to re-prioritize agency resources to meet customer demands for service, and the ability to take advantage of opportunities as they arise. This also requires the District to have just-in-time financial information and results for good decision making.

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#### **Objective A: Align Resources with Community Need**

**About this Objective:** The District will rely on statistically valid survey information and ongoing resident feedback in deciding capital priorities. Decisions will be based on providing for the strategic greater good of the community rather than randomly selecting tactical approaches in response to special interests. This objective also emphasizes the importance of using sophisticated pricing approaches based on financial targets and market demands.

- **Initiative One:** Improve the capital project review and development process (short-term: 2013-14). *This initiative was completed in 2014.*



## 2016 Year-end Strategic Plan Progress Report

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- **Initiative Two:** Develop a consistent approach to the pricing of services (mid-term: 2014-17).

**Year-end Status Update:** The first step towards developing a consistent approach towards the pricing of programs/services was the development of a cost recovery/subsidy allocation strategy which identified what services/programs to subsidize and at what level. During the program plan and service analysis process, staff developed models for tax-supported programs and enterprise programs based on the District's revenue policies. Staff also researched the elasticity of pricing and services to understand customer pricing thresholds and developed a consistent fee structure. In 2017, staff will undergo a comprehensive review of the District's revenue policies to ensure that they reflect these models and fee structures.

- **Initiative Three:** Ensure transparency by communicating ethics and values to community and internally (continuous: 2013-17).

**Year-end Status Update:** Since 2013, the District has been communicating the following information and initiatives related to the District's ethics, values and financial policies:

- Included in the 2013 Annual Report (sent to all District households) were overviews of how tax dollars are spent and what the strategy is for using tax funds. In addition, the Report provided an overview of every park and facility along with the 2014 proposed capital projects and envisioned future improvements.
- Featured the program plan process as a news item on the EPD website and in the e-newsletter to stress the District's commitment to providing programs and services that customers value, need and contribute to the District's future sustainability.
- Dedicated additional publicity (web, e-news, etc.) to explaining and reporting on the financial assistance program, including how changing economics have resulted in an increased demand for assistance.
- Presented to the Board an overview of the District's ethics policies and procedures (June 11, 2014 Board meeting).
- Created a Stormwater Management section on the District's website to communicate information and updates to our constituents about this important topic. It continues to provide residents timely and comprehensive information on meetings, proposed sites and the decisions reached as well as extensive background information on the issue. The District also communicates stormwater information and status reports via news articles.
- Created a Playground for Everyone section on the District's website to communicate the District's vision and announce fundraising goals to the public.
- Conveyed in the District's 2014 and 2015 Annual Reports (sent to all District households), Board and District priorities, accomplishments and financials.
- Developed and presented to the Park Board (April 27, 2016) an updated communication plan for the District and Board, including updates to website content, press release strategy, and stormwater communications and an overview of the *Explore Elmhurst* initiative lead by the City of Elmhurst.
- Presented (Board President Spaeth and Executive Director Rogers), the first State of the Park District to the community on September 29, 2016. The presentation provided a current



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look at District projects, accomplishments and future plans, while also serving as an introduction and overview of how the Park Board and District serve the Elmhurst community.

- As part of the Vision 2020 process, the District gathered feedback on the effectiveness of communications in the community needs assessment survey. Results illustrated that residents' two most preferred ways to receive information about the District is the program guide and website, which aligns with the top two ways survey respondents learn about District programs and activities.

As noted above, this initiative has been addressed and in future years, will become part of the Marketing and Communications Department's ongoing work plan.

### **Objective B: Take Care of What We Have**

**About this Objective:** The Elmhurst community expects the District to adequately care for current assets before investing in new parks and facilities. As growth and unmet user needs are addressed, the District will also ensure continued maintenance and investment in the existing infrastructure. This includes identifying the operating and maintenance costs for proposed new facilities and developing plans for replacement of existing assets.

- **Initiative One:** Based on the priorities outlined in District planning documents, maintain the District's infrastructure to continue to support high quality offerings (continuous: 2013-17).

**Year-end Status Update:** Capital improvements enhance, expand or maintain the infrastructure that the District needs to provide programs and services to the community and support new growth and development. To ensure a high quality of services and amenities, infrastructure expansion and improvements must continue as the District's demographics change and facilities age. The District's 2016-25 Capital Improvement Plan (CIP) details long-range capital improvement needs by outlining \$45.21 million in infrastructure and equipment improvements and expansions that the District plans to implement during a multi-year period and is annually reviewed and modified as funds and priorities change.

To ensure that the Capital Plan is not merely a wish list, but rather a schedule of realistic needs based on available funding and long-range planning documents, staff use project evaluation criteria to effectively establish a relative priority for assessing and prioritizing projects based on their level of immediacy, impact and necessity. This prioritization process provides a consistent and fair method for assessing projects during the capital planning process.

Therefore, to confirm that the most critical capital needs are met based on funding resources available, staff reviewed if the highest and high priority projects (based on the capital plan criteria rankings) proposed for 2016 were funded and completed. The 2016 Capital Budget proposed by staff and approved by the Board did include the highest and high priority projects. At the end of 2016, the District was accountable for taking care of the community assets by completing the following highest and high priority projects funded in the 2016 capital budget:



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- Butterfield Park and Playground for Everyone Redevelopment;
- Ben Allison Park Sled Hill Redevelopment/Construction
- Courts Plus Tennis Area Lighting Replacement
- Eldridge Park Court Resurfacing
- Parks and Facilities Grounds Equipment Replacement
- SAN (Storage Area Network) and Hosts Upgrade
- Maintenance Facility Overhead Garage Door Replacement
- Wagner Community Center Gymnastic Center Office
- Sugar Creek Parking Lot Improvements
- Crestview Recreation Building Furnace Replacement
- Wagner Community Center Security Camera Replacement
- Depot HVAC Replacement

Two highest/high priority projects were not completed: the Salt Creek Greenway connector construction and The Abbey LED lighting and ceiling upgrades. For the Salt Creek Greenway project, phase two engineering was completed; however, ongoing discussions with adjacent property owners have caused delays for the project (it has been in the capital budget since 2013). Staff is optimistic that the work will proceed in 2017. While the engineering assessment for future Abbey capital projects was completed (including carpeting/flooring replacement, classroom and registration area improvements, and a restroom expansion to meet facility demands and ADA standards), the Abbey LED lighting and ceiling upgrades were postponed until completion of the community needs assessment survey in late 2016 and the completion of the Vision 2020 process to update the District's Comprehensive and Strategic Plans in June 2017. The priorities in those Plans and the community survey will drive future capital planning and facility development, including at The Abbey so staff deferred funding this project until completion of those Plans.

- **Initiative Two:** Create a comprehensive asset management plan that is linked to Capital Plan (Deferred). *This initiative is deferred.*

### **Objective C: Invest In The Future**

**About this Objective:** The District desires to be flexible and nimble in order to take advantage of opportunities that arise. The goal is to position the agency in its ability to meet future demand and customer preferences. At the same time, there will be continued effort in identifying efficiencies throughout operations, such as utility consumption.

- **Initiative One:** Seek opportunities that will positively impact the District's finances (continuous: 2014-17).



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**Year-end Status Update:** To address this initiative, staff have focused on fundraising, exploring new or expanding current programs and facilities/amenities which improve cost recovery, and implementing new retention strategies. Outcomes for 2016 are as follows:

**Fundraising:** In 2015, staff initiated fundraising for the Playground for Everyone project in Butterfield Park. The goal was to raise the additional funds needed to build a universal playground (\$250,000 higher than budgeted). With generous donations from numerous community groups and individuals along with the funds raised at the February “Be a Kid Again” fundraiser, the People for Elmhurst Parks (PEP) Foundation was able to contribute \$150,000 toward the project. The donation was presented to the Board in June 2016, and the District utilized an additional \$100,000 from existing donations to complete the project.

**Explore New or Expand Programming and Facilities/Amenities to Improve/Maintain Cost Recovery:**

Examples for the first six months of 2016 include the following:

- As staff continue to refine the scheduled use of Multipurpose Room A at the Wagner Community Center, participation in youth and preschool seasonal sports continued to grow, along with the associated program revenue.
- Dance Company participation/revenue grew, as the group added major events/competitions to ensure participants continue to be challenged.
- With the conversion of the preschool storage area at the Wagner Community Center into Music Room 4 and the focus on improved curriculum/resources, music program participation/revenue continued to increase.
- To provide an opportunity for parents and tots to swim without older children in the pool and at a time of day that is conducive to preschoolers’ schedules (pre-nap and lunch time), aquatic staff offered a new Tot Time Open Swim at Smalley Pool on Saturday mornings from 9 a.m. to 12:00 p.m., which has been well attended with an average of 200 swimmers per session who pay regular admission prices.

Examples for the second six months of 2016 include the following:

- Refined the schedule in the Gymnastics Center to ensure the quality of programming while also meeting the diverse needs of both the recreation and competitive classes/teams, resulting in a considerable increase in program net income in this area.
- Continued investing in the Sunbeams and Rainbows Preschool program, including addressing aging furniture, interest center equipment and learning materials, leading to a slightly lower net income in 2016 as compared to 2015.
- Moved to a contractual provider from in-house staff run programs for Princess/Superhero Camps, realizing a considerably higher net income in 2016.
- Added new fitness and visual arts programs at the Abbey in 2016, which dramatically grew senior program revenue.
- Added value to the Courts Plus membership by offering special amenities and programs, including serving ice water on the Fitness Floor at various times of the day and providing

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umbrellas to use on rainy days along with hosting free presentations with Elmhurst/Edwards Health.

- Added and expanded tennis programs (e.g. Mixed Doubles Drill, Drop In Drill, High School Tournament Group, and Beginner Private Group Lessons), realizing increased revenue in this program area in 2016.
- Began hosting Weight Watchers Meetings, a new service, resulting in \$7,650 a year in new revenue in 2016.
- Offered Santa's Workshop, a new special event at the Wilder Mansion, with 119 participants and positive feedback from the attendees.
- Replaced tennis court lighting with modern LED lighting to provide a better visual environment for tennis players as well as significantly reduce costs in both electricity consumption and staff time with reduced frequency of replacing light bulbs.

**Evaluate and Improve Retention Strategies:** Based on work with Atwood Consulting (the firm hired to conduct a business assessment of Courts Plus and provide recommendations), Courts Plus staff instituted a sales focused on-boarding system in 2015. The new system, along with improved target marketing, resulted in a record year in 2016 for both new members and canceled members, resulting in a decrease in net total members of 250 (versus net gain of 35 members in 2015). However, since the average number of monthly-fee paying members improved by 2.8% (7,513 vs 7,307), membership revenue increased by \$31,542 as compared with 2015. Courts Plus staff continues to focus on increasing new membership revenue through improved sales performance and overall membership revenue through higher retention and creating a positive, results driven culture with staff functioning as a committed team.

- **Initiative Two:** Develop, implement and track cost recovery goals (mid- and long-term: 2014-17).

**Year-end Status Update:** One of the outcomes of the program plan and service analysis process was the classification of programming and services into different categories based on community benefit levels and the determination of specific cost recovery goals (enterprise and tax-supported), ranging from 0% to 125% for each of these categories (e.g., social and educational, community events, beginning/intermediate skill based, special events, rentals, etc.). The program/service categorizations have been compared to the current account structure in the general ledger system. In many cases, general ledger accounts contain multiple programs with varying cost recovery goals.

For the 2017 budget, staff added new general ledger accounts for program and service categories to ensure that an account series has a single defined cost recovery goal. In addition, staff assigned Departments an indirect cost percentage in the budget based on historical actual Department indirect expenses to apply to programs to ensure that each are budgeted at the appropriate cost recovery goal. The Board's 2017 Quarterly Financial Reports will report on each Department's actual performance as compared to cost recovery goals.



### Improvement through Collaboration and Innovation Theme

**About this Theme:** The District's tenet of pursuing operational excellence will be achieved through an inclusive and participative team-based environment. In addition, the District, rather than make decisions based on the status quo, will rely on best practice approaches founded on innovative techniques that result in sustainable organizational improvement.

#### **Objective A: Create a Borderless Organization**

**About this Objective:** Effective communication across the organization results in efficient internal service, in support of providing excellent external service. Internal seamlessness and ongoing communication is vitally important and requires identification of workplace barriers and standard operating procedures to guide staff in working effectively with others.

- **Initiative One:** Conduct methods to gather internal customer feedback and improve internal business performance (deferred). *This initiative is deferred.*
- **Initiative Two:** Evaluate and implement opportunities for employees to collaborate (continuous: 2013-17).

**Year-end Status Update:** The District's cross-departmental/functional teams are intended to foster an exchange of ideas and the collaborative development and implementation of work plans. A new cross-functional team was formed and met in the first half of 2016 to review the full-time performance evaluation system (see page 30) and another was formed in the second half of 2016 to evaluate and determine training needs. The District also has two ongoing Employee Committees (Employee Relations and Safety) and cross-functional teams for registration, capital planning, environmental planning (green team) and performance management/job description review. In 2017, a cross-function team will be formed to update the Strategic Technology Plan and for the Vision 2020 process, consisting of staff from all Departments and levels in the organization.

- **Initiative Three:** Evaluate and enhance communication among District employees (short-term: 2013-15). *This initiative was completed in 2015.*



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### **Objective B: Excellence in Innovative Operational Management**

**About this Objective:** The District will efficiently and effectively leverage labor resources in operations. Furthermore, the District will identify and continuously improve key processes and work toward adopting industry best practices.

- **Initiative One:** Complete a work analysis/staffing review to determine the best allocation of labor dollars (mid- and long-term: 2014-17).

#### **Year-end Status Update:**

**Staffing Study:** To conduct an objective and comprehensive analysis of the appropriate level of staffing and departmental organizational structure to utilize resources in the most effective manner, staff hired a professional services firm with expertise in completing these types of studies. The District selected the firm by utilizing a qualifications based selection process in June 2014 and chose Matrix Consulting Group based on their qualifications and experience with government operations and their professional and analytical approach tailored to address issues specific to the District. In August 2014, the Board approved the expenditure of \$37,000 for Matrix Consulting Group to complete the analysis of full- and part-time staffing.

After Board approval, the firm completed the following tasks to conduct the analysis (from July 2014 to June 2015):

- collected the District's staffing and organizational data, including conducting interviews with department managers, supervisors and front line staff, observing selected parks and facilities, and reviewing of department workloads and budgets.
- compiled the District's draft descriptive profile, organizational structure, and job specific key roles and responsibilities.
- completed a draft diagnostic assessment of the District's staffing, highlighting performance targets and potential operational alternatives to current practices.
- submitted the final report with recommendations and a documentation of the process.
- presented the report to the Management Team and the Division Manager – Human Resources and Risk Management. At a subsequent meeting, staff preliminarily reviewed and discussed the recommendations.

In April 2016, the Management Team and Division Manager of Human Resources and Risk Management comprehensively assessed the feasibility, status, and follow-up necessary to address the forty-six (46) recommendations to determine which have been accomplished, require additional analysis or should not be pursued (if unrealistic to implement). After this evaluation, staff determined that 33% of the recommendations had been accomplished, 33% will not be pursued based on feasibility of implementation or due to other options being implemented to address the recommendation and 35% require further research, analysis and discussion in 2016 based on their potential operational and financial impact.

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At year-end, the District had implemented an additional seven (7) recommendations with only 20% (9 of 46) remaining outstanding. To date, some of the major outcomes of the study include the following:

- restructured the Marketing and Communications Department to provide improved focus on sponsorships, event management and social media efforts;
- during Vision 2020 process, conducted Organizational Culture Survey of full- and part-time/seasonal staff;
- shifted Financial Operations Supervisor position from Enterprise Services Department to Finance and Human Resources Department to improve reporting relationship between Finance and Courts Plus;
- Began 360 Degree Leadership Training program with mid-level managers;
- changed the Program Manager-Inclusion position to full-time to address the growing need for inclusion services for the population with disabilities; and
- transferred oversight of Sugar Creek Golf Course from the Executive Director to the Director of Enterprise Services for more optimal organizational alignment;

**Compensation Study:** A compensation analysis was originally planned to occur with the staffing analysis in 2014-15. However, it was cost prohibitive to complete at that time. Therefore, staff deferred the project and the Board approved it as part of the 2016 Budget. The purpose of this analysis is to review the District's salary classification structures to ensure fair, equitable and competitive wages. Staff prepared a Request for Proposal (RFP) to solicit firms to complete the analysis, and in May 2016, advertised availability of the RFP on the District's website and in the Daily Herald. Utilizing a qualifications based selection process, staff reviewed proposals and interviewed and selected the best firm to complete the Study. At the July 25, 2016 Board meeting, staff recommended, and Board approved, the expenditure to hire GovHR, LLC of Northbrook, Illinois.

To kick-off the project, GovHR held a meeting with Human Resources staff, followed by employee meetings and interviews to gather more details about positions and responsibilities. A salary survey of comparable Districts was also conducted to gauge market ranges. GovHR is compiling the data and targets completing the Study in April 2017. Staff will then review and assess report outcomes, including any impact to the 2018 Budget and determine next steps and timelines for implementation.

- **Initiative Two:** Develop a dashboard of key indicators to assess and improve organizational performance (long-term: 2015-17).

**Year-end Status Update:** The Management Team continues to report new Strategic Plan performance measures so that the Board and staff can effectively monitor the achievement of District strategy. For example, staff began tracking and reporting additional financial measures in the 2015 Year-end Strategic Plan Progress Report and new registration and financial measures in the 2016 Mid-year and Year-end Reports. In 2017, staff will research dashboard software that will facilitate the reporting and tracking of strategic measures and develop metrics



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based on the feedback and performance data developed and collected during the Vision 2020 process. For a list of the Strategic Plan performance measures, see pages 31-46.

➤ **Initiative Three:** Institutionalize sustainable internal operations (continuous: 2013-16).

**Year-end Status Update:** In 2016, the Green Team created an action plan and assigned tasks to members to achieve an 8% score improvement on the Illinois Park and Recreation Association (IPRA) Environmental Report Card by the end of the year (the District's score was 61% at the end of 2015). The Report Card is a tool utilized by Park Districts to assess their sustainability and environmental initiatives. At the conclusion of 2016, the Green Team's action plan and review of 2015 scoring resulted in the District earning additional points on the Report Card that brought the District's total score to 70%. Some of the initiatives implemented by the Green Team include:

- Prepared and posted five Environmental Tips posters in the break rooms at all District facilities;
- Added a new recreation staff representative to Green Team;
- With the Employee Relations Committee, hosted a staff park cleanup event on Earth Day at East End Park;
- Organized the installation of a Paper Retriever (paper recycling bin) in the Abbey parking lot and a second bin at the Courts Plus parking lot;
- Updated the "Commitment to the Environment" statement for bid documents and included it in four bid documents;
- Reviewed and updated the Environmental Guidelines for Plant Healthcare & Pest Management and the Green Cleaner Product & Vendor List;
- Implemented and managed battery, paint, aerosol, pen/marker, holiday lights, and tennis ball recycling throughout the District;
- Created and installed "no idling" stickers in all District vehicles, along with educating staff about the impact of idling vehicles; and
- Educated public and staff on wildlife issues through signs in parks regarding the emerald ash borer and red-winged black birds, along with updated information on the District's website regarding coyotes and cicada killer wasps.

➤ **Initiative Four:** Utilize and improve technology for efficiency and reporting (continuous: 2014-17).

**Year-end Status Update:**

**Strategic Technology Plan:** As technology continues to be a necessary part of conducting business, the District places a high priority on developing and implementing a Strategic Technology Plan (STP). A new plan is developed every three years to allow for maximum productivity. The current plan was completed in 2014 by a cross-functional Strategic Information Technology Committee consisting of representatives from all departments and will be updated in 2017 by a cross-functional committee.



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The Strategic Technology Plan initiative implemented in 2016 was the Storage Area Network (SAN) project. Within a virtualized environment, numerous virtualized servers reside on a host (small physical server). All the virtualized servers then access a SAN (storage area network). A SAN connects multiple servers to a centralized pool of disk storage. The District's current SAN was installed in 2012 and industry trends call for replacement every 3-5 years to avoid failure. Therefore, the Board approved replacing the current model on March 23, 2016 based on this schedule and to also add more space for storage. All of the District's financial software, payroll, registration, email, file services and directory services operate using the SAN. The SAN project was completed by April 2016 for \$46,771.

Other 2016 technology improvements included the following:

- renewed and updated Barracuda firewall hardware and software/security application definitions to provide security across the infrastructure for inbound and outbound connections;
- renewed and updated link balancer hardware and application software to run balanced internet connectivity between web site traffic and failover protection between internet providers; and
- renewed and updated mail archiver hardware and application software to offer an email archiving solution that optimizes email storage, meets regulatory compliance and anytime/anywhere access to old emails.

***New Registration System:*** RecTrac, the District's program registration system, was purchased in February 2015. Since then, the District has installed the RecTrac and WebTrac servers, additional hardware and software, and completed implementation, design, and preliminary training. Courts Plus transferred the membership database in November 2015 and program registration went live in December 2015.

As of March 2016, the District had gone through two high volume online registration dates. During both of these dates, customers experienced long delays online in the registration process. As a result, steps were taken to eliminate the delays and improve the software's performance, which included organizing the ad hoc technology committee, contracting with Sterling Network Integration to assist with system analysis, and moving forward with the approved Storage Area Network (SAN) project described in the previous section.

The configuration of the new SAN included increasing the number of CPU cores for RecTrac from 8 to 24. In April 2016, after the network changes were made, the District completed load testing of the RecTrac database with support services from Vermont Systems. Prior to the SAN upgrade, CPU usage ranged from 40%-99%, and after the upgrade, CPU usage ranged from 3%-20%. Load testing produced only 49 minor error requests out of 19,895 total requests and was considered successful. Summer online registration was on May 7, 2016 and as a result of the changes, customers did not experience any online registration delays.

Vermont Systems continues to release upgraded builds to the registration software, which are carefully reviewed prior to implementation. Vermont Systems conducted a load test to ensure that customers did not experience difficulties during fall 2016 registration. Fall registration ran smoothly as staff continued to monitor CPU utilization, load balancing, and bandwidth



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consumption for inbound connections to the Rectrac server. Community confidence continues to grow as the opening day lines for registration decrease and on-line registrations have increased from 698 in February 2016 to 883 in February 2017. Even though this project is completed, system performance will continue to be monitored in future years.

### Continuous Improvement through an Empowered Team Theme

**About this Theme:** Continuous improvement is an ongoing effort to improve products, services, and processes. These improvements will be accomplished through both Board members and staff by providing the tools and opportunities necessary to work together as a team and make decisions in the best interest of the District.

#### **Objective A: Develop an Empowered Staff**

**About this Objective:** Leadership competencies will include a participative leadership style and team based approaches. In addition, leaders will define empowerment and provide guidelines and boundaries for employee decision making.

- **Initiative One:** Strengthen District training to facilitate the empowerment of staff (long-term: 2015-16).

**Year-end Status Update:** In June 2015, Human Resources staff asked managers and supervisors to take an inventory of current training practices, including what types of training the District provides new staff to prepare them for their role, what training is provided to current staff to ensure that they are aware of current practices and procedures and how the District further develops employee skills. Managers and supervisors were also asked to provide feedback on additional training that they would like offered to staff.

During the second half of 2016, Human Resources staff formed a cross-functional team (with ten (10) employees), which discussed the inventory findings, determined any deficiencies and recommended the additional training needed to address those deficiencies. Several of the Committee's recommendations were addressed in 2016 and will continue to be implemented in 2017. For example, a training page was created on the District's intranet site to provide a central location for the sharing of resources, including videos and documents. In addition, staff continue



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to videotape internal trainings so they can be captured for future use and will investigate implementing an annual new training topic for all staff.

- **Initiative Two:** Develop leaders (long-term: 2015-17).

**Year-end Status Update:** During 2015, staff completed a review of leadership training materials to utilize John C. Maxwell's 360° Leader training program. In September 2016, sixteen mid-level supervisory staff began a six-session Lunch and Learn workshop program using John C. Maxwell's book, The 360 Degree Leader. The program illustrates to participants how to have greater impact in the organization by utilizing the law of influence - how to lead up, lead down, and lead across, to impact subordinates, peers, and supervisors. In 2017, the program will conclude during the first part of the year, and a participant evaluation of the program will be conducted to gauge its effectiveness.

### **Objective B: Create a Culture of Continuous Improvement**

**About this Objective:** A continuous improvement environment requires all staff and Board members of the District to play a role in improvement efforts. It also requires knowledge of process improvements, or having knowledge about waste and errors in work methods and how to streamline them. This culture suggests the need to question status quo thinking.

- **Initiative One:** Consider a Board assessment process to continuously improve Board governance (long-term: 2015-17).

**Year-end Status Update** In April 2016, the Board undertook a self-evaluation process that was facilitated by Peter Murphy of the Illinois Association of Park Districts (IAPD). Mr. Murphy provided the board with several handouts including a compiled listing of board responses to a questionnaire regarding commissioner responsibilities and a recommended reading list geared toward leadership competencies. During the session, the board also undertook an additional questionnaire to gain insight to any areas needing improvement. Thereafter, in May, the Board held a follow up on the self-evaluation, which included a discussion of ways to operate more efficiently and effectively.

In 2017, staff will develop an "exit" interview for outgoing Board members to effectively transfer knowledge to current and new members. This questionnaire will be utilized for the first time with Commissioner Pelosi at the end of his term.

- **Initiative Two:** Formalize a process for management of organizational knowledge (Deferred). *This initiative is deferred.*



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### **Objective C: Foster a Culture of Innovation**

**About this Objective:** Innovation requires a work culture that embraces change and is supported by encouraging staff to try new processes and services. Alignment exists between agency systems such as recruitment, hiring, reward and recognition, and performance feedback in support of adopting innovation. Changes in programs and services result from knowledge of industry trends and future customer requirements.

- **Initiative One:** Research industry trends and identify ways of integrating new ideas into programs, facilities and services (long-term: 2017).

**Year-end Status Update:** In 2016 and 2017, the data collected and the planning workshops for the Vision 2020 process will provide District employees' current national and local community and industry trends and use of this data for planning programs, facilities and services. The outcomes of the process and the data collected (e.g. community needs assessment survey, national and local trend analysis, park scorecard assessments, program assessments, etc.) will be used to continue the implementation of strategic and comprehensive plan priorities and for annual program and facility planning to enhance staff knowledge and use of current on industry trends and customer preferences.

- **Initiative Two:** Establish organizational systems to promote innovation (long-term: 2016-17)

**Year-end Status Update:** To address this initiative of establishing organizational systems to promote innovation, the Executive Director felt the District's current full-time performance management system required review. In March 2016, Human Resources staff formed a cross functional team to evaluate the District's full-time performance management system. Consisting of fifteen (15) employees from all District departments, members met to discuss the District's current performance appraisal system and new approaches which could be considered for implementation. To support the Committee's discussions, Human Resources staff evaluated and provided recommendations to assist with determining the best system for the District.

After much discussion, the Committee recommended and the Executive Director concurred that the District will continue to utilize the system currently in place with a few minor adjustments. First, instead of a District-wide pool, merit pools will be divided by department to improve imbalances in the distribution of the pool (e.g. dissimilar job positions' evaluation outcomes will not be compared across Departments). Human Resources staff also will provide additional training to new employees to explain the District's system, as well as to new managers to help them understand and effectively implement it.

To continue to address this initiative in 2017, staff will review the District's current employee recognition and reward program and best practices and innovations to improve the District's current recognition and reward system.

# 2016 Year-end Strategic Plan Progress Report

## Performance Measures






Performance measurement provides data to complement decision making, improve performance, communicate progress and foster accountability. Using the Strategic Plan Strategy Map (see page 8), the Management Team develops measures for monitoring the impact of implementing the Strategic Objectives. The charts on pages 32-46 illustrate the measures that are tracked and reported semi-annually or annually in the Strategic Plan Progress Report (SPPR) or will be tracked in future years of the Strategic Plan.

As staff continues implementation of the 2013-17 Strategic Plan, some of the performance measures are a work in progress and will be further refined as staff determine if and when it is feasible to begin tracking each measure, the frequency each should be tracked (semi-annually or annually) and the availability of historical data for assessing long-term trends. Some of the proposed measures may also change or new ones added after the completion related initiatives.

In 2016, staff started tracking new registration and financial measures based on best practices in performance reporting and the capabilities of the new registration system (i.e., total unique registrations, program revenue per unique participant, participation by age group and percent of unique resident households completing a transaction). Staff continues developing and refining performance targets for new measures to provide a snapshot of how actual performance compares to the annual goal along with adding charts to communicate changes in performance levels over time. In 2017, staff will also research dashboard software, which will facilitate improved reporting and tracking of Strategic Plan measures and develop metrics based on the feedback and performance data developed and collected during the Vision 2020 process.

### *Performance Reporting*

For measures that are tracked on semi-annual basis (as indicated in the last column of the charts on pages 22-46), staff provide year-end actual performance data in the performance measure outcome tables. Staff developed the symbols below to convey how actual performance compares to the performance target. The parenthesis after each performance category defines the outcome range for that category. By tracking achievement of performance targets, the Board and staff can assess the effectiveness of the current SWP toward achieving District strategy and make adjustments to work plans and the allocation of resources to ensure the future success of the Plan.

<u>Significantly Above Target</u> (>10%) 	<u>Above Target</u> (0.01% to 10%) 	<u>At Target</u> (0%) 	<u>Below Target</u> (-.01% to -10%) 	<u>Significantly Below Target</u> (<-10%) 
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# 2016 Year-end Strategic Plan Progress Report

## *Performance Measures by Theme*

<b>Customer Centered Theme</b>			
<b>Performance Measure</b>	<b>Performance Target</b>	<b>Timing of Reporting and Year to Begin Tracking</b>	<b>Lead Department(s)</b>
Program Success Rate	80% or higher	Semi-annually 2013	Enterprise/Recreation
Total Unique Registrants	8,800	Semi-annually 2016	Finance
Percent of Program and Pass Registrants by Age Group	To be determined	Semi-annually 2016	Finance
Percent of Unique Resident Households Completing a Transaction	50%	Annually 2016	Finance
Customer Satisfaction Standards (park & facility, services, membership and programs)	To be determined	<b>Annually 2017</b>	Marketing

**Bold Text:** Reporting moved to 2017 based on the timing of Vision 2020 process.

The District serves the community in many ways, many of which can be difficult to track such as attendance at non-registered community events. In 2016, the Park District conducted a Community Needs Assessment survey in which 88% of respondents indicated that they or a member of their household has visited a park in the past year and 45% registered for a program. Staff also surveyed Courts Plus members and pool pass holders to gather feedback and implement improvements to enhance the customer experience at both those facilities and continues to conduct participant program evaluations. In 2017, staff will assess what measures can be added to this report to assess overall customer satisfaction and will continue to track the customer measures in this section, which highlight the District's efforts in reaching members of the community and participation levels.

### ***Program Success Rate***

One indicator of the District's success with matching the "right" array of programs and services to meet customer interest and demand along with marketplace trends is the success rate of programs (total number of courses offered versus the total number of courses that ran).

*Recreation Programs:* As illustrated in the chart on the following page, in 2016, the recreation program average success rate of 88.7% is above the District's performance standard of 80.0% and a 0.8% decrease as compared to the year-end 2015 success rate of 89.4%. Program areas with success rates below 80.0% include: Adult Special Interest, Mind and Body, Nature and Youth/Teen Special Interest.





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Adult Special Interest and Mind and Body program areas traditionally have low interest levels, with enrollments of 59 and 13 respectively. Success rates in these areas are 33% (Adult Interest) and 25% (Mind/Body). Youth/Teen Special Interest programming is quite “trendy”. Consequently, we continue to offer a variety of opportunities to meet the ever-changing interests in this area. As a result, we experienced only 67% success rates, accommodating 546 participants.

Currently Nature programming is offered through a cooperative agreement with the Lakeview Nature Center at the Oakbrook Terrace Park District and of the 114 programs offered to Elmhurst, 73 programs ran (64%). Beginning in fall 2017, the District’s agreement with the Lakeview Nature Center will be modified to mirror the District’s current agreement with the Elmhurst Art Museum (EAM). The District will continue to feature Lakeview programs in each seasonal brochure. However, the Oakbrook Terrace Park District will plan, implement and manage these nature programs at the Center and as was the case with EAM, we anticipate that fully incorporating these programs within the Nature Center will both improve program offerings and participation in environmental programming for both communities.

*Enterprise Programs:* As illustrated below, in 2016, the Enterprise program average success rate of 77.9% is slightly below the District’s performance standard of 80.0% and a 1.4% decrease as compared to 2015 success rate. Enterprise program areas that experienced success rates below 80.0% include fitness programs (74.4%), mind/body programs (64.1%) and Kids Plus programs (68.9%) due to increased competition and climbing wall programs (60%) due to limited interest. Staff are monitoring if this is a trend to determine if changes need to be made to increase success rates.

<u>Category</u>	<u>2015 Year-end Program Success Rate</u>	<u>2016 Year-end Program Success Rate</u>	<u>Annual Performance Target</u>	<u>2016 Year-end Performance Trend</u>
Recreation Programs	89.4%	88.7%	80.0% or above	<b>Significantly Above Target</b> (>10%) 10.9% 
Enterprise Programs	79.0%	77.9%	80.0% or above	<b>Below Target</b> (-.01% to -10) 1.4% 

**Data Source:** Class Registration System (2015) & RecTrac Registration Software (2016)

## 2016 Year-end Strategic Plan Progress Report

### ***Total Unique Registrants***

One indicator of the success of the reach and participation in program offerings is the total of unique individuals registering for programs. Unique registrants is defined as the total number of individuals registered for at least one recreation or enterprise services program (residents and non-residents). Each individual is counted only once regardless of the number of programs that individual was registered for during the measurement period. Programs from Sugar Creek were not included in this measure along with participation in programs not requiring registration, including events. Additionally, registration for adult sports leagues counts as one registration per team.

For 2016, the number of unique registrants was 8,597 as compared to 8,761 in 2015 (a 1.9% decrease) and 2.3% below the performance target. With another year of data available, staff will assess trends for this measure in the 2017 Strategic Plan Progress Reports.

<u>Category</u>	<u>2015 Year-end Total Unique Registrants</u>	<u>2016 Year-end Total Unique Registrants</u>	<u>Year-end Performance Target</u>	<u>2016 Year-end Performance Trend</u>
Total Unique Registrants	8,761	8,597	8,800	<b><u>Below Target</u></b> <b><u>(-.01% to -10)</u></b> 2.3%

**Data Source:** Class Registration System (2015) and RecTrac Registration Software (2016)

### ***Percent of Program and Pass Registrants by Age Group***

One indicator of the District's reach in the community among the youth, adult and senior populations is the number of unique individual District residents registered for at least one recreation and enterprise services program or that purchased a pass divided by the number of residents in Elmhurst in that age group as indicated by the 2010 Census data. This measure does not include Sugar Creek programs and passes or participation in programs which do not require registration such as community events. The chart below illustrates 2016 Year-end percent of unique registrations by each age group. In 2017, staff will have an additional year of data to develop a sound performance target and assess trends in performance.

<u>Category</u>	<u>2015 Year-end Percent of Unique Registrants by Age Group<sup>1,2</sup></u>	<u>2016 Year-end Percent of Unique Registrants by Age Group<sup>1,2</sup></u>	<u>Year-end Performance Target</u>	<u>2017 Year-end Performance Trend</u>
0-4	N/A	36%	N/A	N/A
5-9	N/A	32%	N/A	N/A



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10-14	N/A	17%	N/A	N/A
15-19	N/A	3%	N/A	N/A
20-34	N/A	1%	N/A	N/A
35-49	N/A	2%	N/A	N/A
50-64	N/A	3%	N/A	N/A
65 & Older	N/A	8%	N/A	N/A
Total	N/A	9%	N/A	N/A

<sup>1</sup>Total unique participants in age category/total 2010 Elmhurst population in age category

<sup>2</sup>Removed registrants that had no birthdate (.04% of total population)

**Data Source:** RecTrac Registration Software and 2010 United States Census

### ***Percent of Unique Resident Household Completing a Transaction***


Another indicator of the Elmhurst household involvement in District programs and activities is assessing the percent of unique resident households completing a transaction to register for a program, purchase a facility pass or point of sale item, or rent a facility. This measure illustrates the District's reach in the community as it relates to activities and programs which require payment and/or registration.

The measure is calculated by dividing the unique resident household accounts which have completed a transaction processed through the District's RecTrac software by the total number of households in Elmhurst as indicated by census data. Each resident household account is counted only once regardless of the number of individuals in that household or transactions processed for that household during the measurement period. Programs from Sugar Creek were not included in this measure along with participation in programs not requiring registration, including events. Additionally, registration for adult sports leagues counts as one registration per team.

As illustrated in the chart on the next page, for 2016, the percent of unique resident households that completed a transaction was 40.8%, which is 0.3% higher than 2015 and 18.4% below the performance target. With another year of data available, staff will assess trends for this measure in the 2017 Year-end Strategic Plan Progress Report.



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<u>Category</u>	<u>2015 Percent of Unique Resident Households Completing a Transaction</u>	<u>2016 Percent of Unique Resident Households Completing a Transaction</u>	<u>Year-end Performance Target</u>	<u>2016 Year-end Performance Trend</u>
Percent of Unique Resident Households Completing a Transaction	40.7%	40.8%	50.0%	<b>Significantly Below Target (&lt;-10%)</b> 18.4% 

**Data Source:** Class Registration System (2015), RecTrac Registration Software (2016) and 2010 United States Census

<b>Fiscal Agility Theme</b>			
<b>Performance Measure</b>	<b>Performance Target</b>	<b>Timing of Reporting and Year to Begin Tracking</b>	<b>Lead Department(s)</b>
Percent of Non-tax Revenue	60% or higher	Annually 2013	Finance
Met Reserve Targets – 1 <sup>st</sup> Tier	Met Board Reserve Policy Targets	Annually 2013	Finance
Met Reserve Targets – 2 <sup>nd</sup> Tier	Met Budget Target	Annually 2013	Finance
Capital Assets Condition Ratio	50%	Annually 2015	Finance
Debt Service Ratio	20%	Annually 2015	Finance
Fund Balance as a Percentage of Expenditures	Met Board Fund Balance Policy	<b>Annually 2017</b>	Finance
Program Revenue Per Unique Registrant	\$500	Semi-annually 2016	Finance
Percent of Profit Earned-Courts Plus	15%	<b>Annually 2017</b>	Finance/Enterprise
Average Dollar of Round per Golfer	Higher than the previous six-year average	Annually 2013	Golf Course
Cost Recovery Goals	Met Cost Recovery Goals	Annually 2017	Finance

**Bold Text:** Reporting moved to 2017 based on the timing of the Audit.




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Staff has continued adding measures to track achievement of the Fiscal Agility theme and will track a few new measures in 2017, including cost recover goals. In this report, staff added performance targets for the capital assets condition ratio, debt service ratio and program revenue per unique registrant.

### ***Percent of Non-tax Revenue***

The Board has a policy that 60% of revenue be received from other sources besides taxes. Examples of non-tax revenue include user and membership fees, retail sales, interest income, grants, contractual receipts, sponsorships and donations. As illustrated in the chart below, 2015 year-end revenue was a split of 42% taxes and 58% non-tax revenue, which was 3.3% below the Board policy (due primarily to the District receiving 4% higher tax revenue than budgeted (\$380,000)). In the 2016 Budget, staff projected a split of 41% tax revenue to 59% non-tax revenue at year-end. Actual 2016 revenue was a split of 40% taxes and 60% non-tax revenue, which meets Board policy and was due primarily to the District receiving OSLAD grant proceeds of \$400,000 and \$156,190 in donation revenue for the redevelopment of Butterfield Park and the Playground for Everyone.

Staff continue to review and implement revenue pricing strategies based on trends and market conditions and evaluate and pursue partnership and grant opportunities to ensure that the performance target is met in future years.

<u>Category</u>	<u>2015 Percent of Non-tax Revenue</u>	<u>2016 Percent of Non-tax Revenue</u>	<u>Annual Performance Target</u>	<u>2016 Performance Trend</u>
Percent of Non-Tax Revenue	58%	60%	60% or above	<b><u>At Target</u></b> (0%) 

**Data Source:** Eden Financial System

### ***Cash and Investment Targets – 1<sup>st</sup> Tier***











To ensure that the District remains fiscally strong in future years, the Board has a Reserve Policy with a two-tiered level for its cash and investments for all operating funds. The first-tier target levels are in place to ensure that the District is able to meet cash flow obligations and emergency or unanticipated expenditures or revenue shortfalls. The policy states that the budget must provide for cash and investments of not less than the percent of projected expenses established for each of the major funds/departments based on their cash flow (e.g. General Fund is 35% of expenses). As illustrated in the chart on the next page, the District exceeded its target levels in 2016 in all funds except the Sugar Creek Golf Course Fund. The percent or amount of expenses for each fund/department that is required in the policy is in the first column, the amount of cash and investments projected in the 2016 Budget for meeting the target is in the second column,



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the actual level of cash and investments at year-end is in the third column and the percentage of cash and investments above/below the target is in the fourth column.

The Sugar Creek Golf Course Fund is below its performance target due to the spending of income to pay the debt to redevelop the clubhouse, make course improvements and purchase and develop the driving range. In 2015 and 2016, Sugar Creek paid the full principal and interest payments on both debt instruments without incurring any additional intergovernmental long-term debt. Staff continue to look critically at spending and maximizing revenue through enhanced marketing efforts, increased programs and market-driven pricing.

<u>Category</u>	<u>2016 Budget Performance Target</u>	<u>2016 Actual Cash and Investments<sup>1</sup> 1<sup>st</sup> Tier</u>	<u>2016 Performance Trend</u>
General Fund (35%)	\$1,192,362	\$2,878,878	141.4% 
Recreation Fund (10%)	\$534,469	\$3,072,553	474.9% 
Enterprise Services (15% & \$1.2 million)	\$2,008,795	\$2,838,298	42.4% 
IMRF Department (50%)	\$183,695	\$203,426	10.7% 
FICA Department (50%)	\$185,845	\$419,897	125.9% 
Liability Department (10%)	\$24,307	\$258,516	963.5% 
Audit Department (50%)	\$25,120	\$51,840	106.4% 
Special Recreation Department (25%)	\$209,360	\$360,902	72.4% 
Museum Department (25%)	\$67,335	\$196,553	191.9% 
Sugar Creek Golf Course (\$300,000)	\$300,000	\$26,535	-91.2% 

**Data Source:** Eden Financial System

### *Cash and Investment Targets – 2<sup>nd</sup> Tier*

To ensure that the District remains fiscally strong in future years, the Board has a Reserve Policy with a two-tiered level for its cash and investments for all operating funds. If the first tier targets are achieved as described on the previous page, the budget must provide the surplus funds necessary to implement the Capital Improvement Plan (current or future projects) or fund future debt. As illustrated in the chart on the next page, the District exceeded its projected second-tier










<sup>1</sup> Unaudited



## 2016 Year-end Strategic Plan Progress Report

levels at year-end in all funds except the IMRF, Enterprise Services and Sugar Creek Golf Course Funds. The amount of cash and investments projected in the 2016 Budget above the first-tier targets is in the second column, the actual level of cash and investments at year-end above the first-tier targets is in the third column and the percentage of cash and investments above/below the second-tier targets is in the fourth column.

The second tier cash and investment balance is 222% higher in the General Fund and 25% lower in Enterprise Services Fund primarily due to a variance from the 2016 budgeted beginning balance of cash and investments in both funds related to the transfer of the Sugar Creek investment from the Enterprise Services Fund to the General Fund. In addition, projected year-end revenue over expenses for 2016 in the General Fund is \$232,613 versus \$18,103 in the 2016 Budget. The IMRF second-tier target is 75.5% lower than budget also due to a variance in the beginning of the year cash and investments due to 2015 tax receipts being lower than projected in the budget. The Sugar Creek Golf Course Fund does not have second-tier reserves due to the spending of income to pay the debt to redevelop the clubhouse, make course improvements and purchase and develop the driving range. Staff continue to look critically at spending and maximizing revenue through enhanced marketing efforts, increased programs and market-driven pricing to build reserves.

<u>Category</u>	<u>2016 Budget Performance Target</u>	<u>2016 Actual Cash and Investment 2nd Tier<sup>2</sup></u>	<u>2016 Performance Trend</u>
General Fund	\$523,226	\$1,686,516	222.3% 
Recreation Fund	\$1,279,967	\$2,538,084	98.3% 
Enterprise Services	\$1,132,666	\$844,503	-25.4% 
IMRF Department	\$80,591	\$19,732	-75.5% 
FICA Department	\$163,139	\$234,209	43.5% 
Liability Department	\$215,076	\$234,209	8.9% 
Audit Department	\$24,200	\$26,720	10.4% 
Special Recreation Department	\$72,206	\$151,542	109.9% 
Museum Department	\$103,647	\$129,218	24.7% 
Sugar Creek Golf Course	\$0	\$0	N/A

**Data Source:** Eden Financial System

<sup>2</sup> Unaudited






## 2016 Year-end Strategic Plan Progress Report

### **Capital Assets Condition Ratio**

It is important to annually review capital needs in order to plan for future funding. One quantitative barometer for assessing the need for facility and equipment upgrades is the capital asset condition ratio. A higher ratio suggests an organization is making investments on a routine basis. The measure specifically considers the remaining useful life of facilities and equipment based on depreciation and is calculated by dividing the remaining value of the District's depreciable assets by the original value of those assets. The District does record capital assets separately for the Governmental, Enterprise Services, and the Sugar Creek Golf Course Funds.

The District's 2015 and 2016 capital asset condition ratios are illustrated in the chart below. In 2016, net depreciation for governmental assets was \$1,610,441, for Enterprise Services assets was \$362,578 and for Sugar Creek assets was \$81,212. The performance target identified for the Capital Asset Condition Ratio is 50% set to ensure the District invests sufficient dollars to offset the annual depreciation of the District's assets. Both Enterprise Services Fund and Sugar Creek fall below the target as the District is conservatively investing in assets at these facilities to assist in also meeting profit and cash and investment goals.

<u>Category</u>	<u>2015 Capital Asset Condition Ratio</u>	<u>2016 Capital Asset Condition Ratio</u>	<u>Annual Performance Target</u>	<u>2016 Year-end Performance Trend</u>
Governmental Funds	57.1%	56.3%	50.0%	<b>Significantly Above Target</b> ( <b>&gt;10%</b> ) 12.6% 
Enterprise Services	42.6%	40.9%	50.0%	<b>Significantly Below Target</b> ( <b>&lt;-10%</b> ) -22.2% 
Sugar Creek	38.2%	36.0%	50.0%	<b>Significantly Below Target</b> ( <b>&lt;-10%</b> ) -28.0% 

**Data Source:** Eden Financial System




### **Debt Service Ratio**

The debt service ratio is used to analyze an organizations service flexibility with the amount of expenses committed to annual debt service. The ratio divides total debt service principal and interest by total expenses plus principal. As the ratio increases, service flexibility decreases because more resources are being committed to a required financial obligation. For this ratio, transfers between funds are not included in total expenses. The chart on the next page illustrates the 2015 and 2016 debt service ratios for the Governmental funds, Enterprise Services, and the

## 2016 Year-end Strategic Plan Progress Report

Sugar Creek Golf Course funds. The performance target identified for the Debt Service Ratio is 20% which allows for operational flexibility by limiting committed resources.

Sugar Creek is currently below target due to its obligations on two debt instruments which were used to improve the golf course and clubhouse. One is debt certificates through Elmhurst Park District with an outstanding balance of \$572,500 and the second is through the Village of Villa Park with a balance of \$675,000. Both are scheduled to be retired in 2022.

<u>Category</u>	<u>2015 Debt Service Ratio</u>	<u>2016 Debt Service Ratio<sup>3</sup></u>	<u>Annual Performance Target</u>	<u>2016 Year-end Performance Trend</u>
Governmental Funds	15.7%	13.1%	20.0%	<b>Significantly Above Target (&gt;10%)</b> 34.5% 
Enterprise Services	1.5%	1.5%	20.0%	<b>Significantly Above Target (&gt;10%)</b> 92.5% 
Sugar Creek Golf Course	30.3%	30.28%	20.0%	<b>Significantly Below Target (&lt;-10%)</b> -51.4% 

**Data Source:** Eden Financial System

### *Program Revenue per Unique Registrant*

One indicator of the District's success with maintaining or increasing non-tax program revenue is the program revenue per unique registrant. This measure is calculated by dividing total revenue generated from recreation and enterprise services programs by the number of unique registrants (residents and non-residents). Unique registrants is the total number of individuals registered for at least one recreation or enterprise services program. Each individual is counted only once regardless of the number of programs that individual was registered for during the measurement period. Programs and revenue from Sugar Creek were not included in this measure. Additionally, registration for adult sports leagues counts as one registration per team.

As illustrated in the chart on the next page, in 2016, the average program revenue earned per participant was \$492 as compared to \$487 in 2015 (a 1.0% increase) and 1.6% below the performance target. After another year of data is available, staff will assess trends for this measure in the 2017 Year-end Strategic Plan Progress Report.

<sup>3</sup> Unaudited



## 2016 Year-end Strategic Plan Progress Report

<u>Category</u>	<u>2015 Year-end Program Revenue Per Unique Registrant</u>	<u>2016 Year-end Program Revenue Per Unique Registrant</u>	<u>Year-end Performance Target</u>	<u>2016 Year-end Performance Trend</u>
Program Revenue Per Unique Registrant	\$474	\$492	\$500	<b>Below Target</b> <b>(-.01% to -10%)</b> 1.6%

**Data Source:** RecTrac Registration Software

### ***Sugar Creek Golf Course Average Dollar of Round per Golfer***


The most realistic measure in determining performance in golf is the average dollar of round per golfer. Any golfer who tees off the first hole sets the cost for that round of golf. The most basic revenues generated from that round, comparable on a yearly basis, are greens fees, riding/pull cart rentals and golf club rentals as they directly result from a round of golf. Many other items such as pro shop sales, driving range sales and food and beverage sales can also be attributed to a round of golf, but since these revenues may not always result primarily from a round of golf, staff track and measure them separately.

Since 2009, the 2016 golf season resulted in the highest dollar earned per round at \$19.63, an increase of \$0.66 per round (3.4%) over 2015 (see charts on the next page). This trend marks the seventh consecutive year of a steady increase in the average dollar per round of golf.

As compared to 2015, the total number of rounds played in 2016 dropped by 1,279 as a result of ten fewer playable days as compared to 2015. Eight and a half of the ten lost days due to weather occurred in July, August and September, which is the height of the golf season. In 2016, there were 172 playable days recorded (March to October) as compared to 182 in 2015. Additionally, the bulk of those decreased rounds were in August when 1,144 fewer rounds were played as compared to August 2015, mainly due to high heat and humidity along with above average rainfall.

Overall, total greens fees, riding/pull cart rentals and golf club rentals decreased as compared to 2015. However, revenue on riding car rentals continued to grow due to adding eight new carts to the rental fleet in 2016. The percentage of golfers renting riding carts increased by 8.3% in 2016 as compared to 2015 (36% from 33% in 2015).

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<u>Category</u>	<u>2015 Average Dollar Per Round</u>	<u>2016 Average Dollar Per Round<sup>4</sup></u>	<u>Annual Performance Target</u>	<u>2016 Performance Trend</u>
Golf Dollar Per Round	\$18.97	\$19.63	Higher than the previous six-year average of \$16.78	<b><u>Significantly Above Target</u></b> <b>(&gt;10%)</b> 17.0% above 

### Annual Dollar Earned per Round from 2010 to 2016

<b>Year</b>	<b>Revenue<sup>5</sup>/Total Rounds</b>	<b>Average Dollar Per Round</b>
2010	\$573,412/37,665	\$15.22
2011	\$498,533/32,330	\$15.42
2012	\$586,748/36,292	\$16.17
2013	\$523,310/30,679	\$17.06
2014	\$525,464/28,411	\$18.50
2015	\$589,238/31,057	\$18.97
Average from 2010-15	\$549,450/32,739	\$16.78
2016	\$584,717/29,778	\$19.63

**Data Source:** Eden Financial System, Microsoft Excel Spreadsheet and Golf Now P.O.S. Software.

<sup>4</sup> Unaudited

<sup>5</sup> Unaudited



## 2016 Year-end Strategic Plan Progress Report

<b>Improvement through Collaboration and Innovation Theme</b>			
<b>Performance Measure</b>	<b>Performance Target</b>	<b>Timing of Reporting and Year to Begin Tracking</b>	<b>Lead Department(s)</b>
Percent of full-time staff involved in cross-functional teams	75% or higher	Semi-annually 2013	Admin
Environmental Report Card Results	80%	Annually 2015	Admin
Satisfaction with internal communications and internal services	To be determined	<b>Annually 2017</b>	Admin and Marketing
Borderless Satisfaction Survey	To be determined	<b>Annually 2017</b>	Admin and Marketing

**Bold Text:** Reporting moved to 2017 based on the timing of the extensive employee feedback collected during the Vision 2020 process (e.g. Organizational Culture Survey, full- and part-time focus groups, etc.).

Performance measures for this Theme will continue to be developed as part of the Vision 2020 process to update the District's strategic and comprehensive plans. Extensive employee feedback was collected (e.g. Organizational Culture Survey, full- and part-time focus groups, strategic planning workshops, etc.), including ways to improve collaboration and innovation. The feedback will be utilized to develop new performance metrics such as the outcomes provided in Organizational Culture Survey results. In this report, staff continues to report on staff involvement in cross-functional teams and the IPRA Report Card.

### ***Percent of Full-time Staff Involved in Cross-functional Teams***

As one indicator to assess the level of formal cross-departmental interaction, staff tracks the percentage of employees serving on cross-functional committees and teams. To successfully foster a borderless organization, the District's standard for the effective level of engagement and involvement of District employees is that at least 75% of full-time employees participate on a cross-functional team. At year-end, 68% (52) of full-time employees were on one of the two ongoing employee committees and/or on a project, policy and/or planning team or task force (51% (39 employees) excluding the Safety and Employee Relations committees), which is an increase of 10.3% as compared to year-end 2015 and 9.3% below the performance target (see chart on the next page). In 2017, the Management Team will continue to determine if employees who currently do not serve on a committee or cross-functional team could serve, where appropriate, on a current or newly created cross-functional team. One example is a new cross-functional team to provide feedback during the Vision 2020 process.

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<u>Category</u>	<u>2015 Year-end Percent of Staff Involved in Cross-functional Teams</u>	<u>2016 Year-end Percent of Staff Involved in Cross-functional Teams</u>	<u>Year-end Performance Target</u>	<u>2016 Year-end Performance Trend</u>
Percent of Full-time Staff	61%	68%	75% or higher	<b>Below Target</b> <b>(-.01% to -10%)</b> 9.3% below

**Data Source:** Abra (HRIS System) and Microsoft Excel

### *Environmental Report Card Results*

The Illinois Park and Recreation Association (IPRA) Environmental Report Card is a tool utilized by Park Districts to assess their sustainability and environmental initiatives. In 2015, the Green Team reviewed and assessed the District's Report Card score of 61% and developed objectives to improve deficient areas and move the District closer to meeting the multi-year performance target of 80% or higher. By implementing these objectives, the Green Team's goal was to increase the overall Report Card score by 8% in 2016 (69% overall score) and by 6% in 2017 (75% overall score).

At the conclusion of 2016, the Green Team's action plan and review of 2015 scoring resulted in the District earning additional points on the Report Card, bringing the District's total score to 70% (a 12.9% increase as compared to 2016). In 2017, the Green Team will continue implementing its action plan to increase the District's total score and move closer to the 80% performance target.

<u>Category</u>	<u>2015 IPRA Environmental Report Card Score</u>	<u>2016 IPRA Environmental Report Card Score</u>	<u>Multi-year Performance Target</u>	<u>2016 Performance Trend</u>
IPRA Report Card Score	61%	70%	80% or higher	<b>Significantly Below Target</b> <b>(&lt;-10%)</b> 12.5% below

**Data Source:** IPRA Report Card score tabulation in Microsoft Excel

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<b>Continuous Improvement through an Empowered Team Theme</b>			
<b>Performance Measure</b>	<b>Performance Target</b>	<b>Timing of Reporting and Year to Begin Tracking</b>	<b>Lead Department(s)</b>
Percent of full-time employees utilizing continuing education	80% or higher	Semi-annually 2013	Finance/HR
Employee satisfaction	To be determined	<b>Annually 2017</b>	Admin/HR/Marketing
Training program satisfaction	To be determined	<b>Annually 2017</b>	HR

**Bold Text:** Reporting moved to 2017 based on the timing of the extensive employee feedback collected during the Vision 2020 process (e.g. Organizational Culture Survey, full- and part-time focus groups, etc.).

Performance measures for this Theme will continue to be developed as part of the Vision 2020 process to update the District's Strategic and Comprehensive Plans. As noted in the previous section, extensive employee feedback was collected (e.g. Organizational Culture Survey, full- and part-time focus groups, strategic planning workshops, etc.), including ways to empower employees. This feedback will be utilized to develop new performance metrics, including the Organizational Culture Survey outcomes. In this report, staff continues to report on the percent of full-time employees utilizing continuing education.

### ***Percent of Full-time Employees Utilizing Continuing Education***

To provide staff with the tools and knowledge to perform their job successfully and expose them to innovative ideas and industry trends, the District encourages full-time staff at every level in the organization to participate in external training (the annual performance target is at least 80% of full-time employees). As illustrated on the following chart, 80% of full-time employees (59 out of 74) took advantage of continuing education opportunities by attending or viewing at least one seminar/webinar training during 2016 provided by an outside organization/individual and submitting required documentation to the Human Resources Division. This percentage is the same as the 2015 year-end percentage of 80% (61 out of 76 full-time employees) and meets the annual performance target of 80% or higher. Supervisors continue to encourage and provide opportunities for staff to attend training to meet the performance target annually.

<b><u>Category</u></b>	<b><u>2015 Year-end Percent of Staff Utilizing Continuing Education</u></b>	<b><u>2016 Year-end Percent of Staff Utilizing Continuing Education</u></b>	<b><u>Year-end Performance Target</u></b>	<b><u>2016 Year-end Performance Trend</u></b>
Percent of Full-time Staff	80%	80%	80% or higher	<b><u>At Target</u></b> (0%)

**Data Source:** Abra (HRIS System)



## Definition of Key Terms

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# 2016 Year-end Strategic Plan Progress Report

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## Definition of Key Terms

The following list of key words describes the definition of the terminology used for the Strategic Plan.

**Vision**—desired future of the organization. The vision should be a “stretch” for the organization, but possible to achieve in approximately five years. It should state a measurable achievement.

**Mission**—describes the business of the organization. The mission also defines the core purpose of the organization and why it exists.

**Values**—describe the way the District operates. Values are meaningful expressions of describing what is important in the way we treat our employees and our guests and relates to the internal culture of the organization.

**Balanced Scorecard Perspectives**—the four perspectives include Customer, Financial, Internal Business Process, and Learning and Growth. They demonstrate cause and effect relationships in the completion of strategy. All of the Strategic Initiatives are aligned with these four perspectives.

**Major Focus Areas**—as part of the planning workshop, staff members were asked to brainstorm ideas about areas of major focus the Department should concentrate on during the next five years. While the focus areas are not part of the strategy map, they do become an important part of strategy formulation. Within the list of objectives and initiatives, references are made throughout the Plan to ensure focus on the five most critical areas.

**Performance Measures**—a standard used to evaluate and communicate performance against expected results. Measures are normally quantitative indicators and capture numbers, dollars, percentages, etc. Measures assist the staff with the ability to determine organizational performance.

**Performance Target**—what the District is trying to achieve to measure accomplishment of the Strategic Objective

**Strategic Themes**—broad brushed macro-oriented organizational sense of direction that relates to the four Balanced Scorecard perspectives of customer, financial, internal business, and growth and development.

**Strategic Objectives**—concise statements describing the specific elements an organization must perform to execute its strategy.

**Strategic Initiatives**—the specific programs, activities, projects, or actions an organization will undertake in an effort to meet performance targets. The strategic initiatives are specifically detailed with specific tactics, which are not included within the body of the Strategic Plan, but will exist in separate documentation.



## 2016 Year-end Strategic Plan Progress Report

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**Tactics**—are subordinate to the initiatives and detail the steps necessary to complete an initiative. Staff members will identify the tactics for the initiatives before the start of each fiscal year.

**Variance**—difference between the expected result and the actual result.

Attachment A  
2016 Strategic Work Plan

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## 2016 Strategic Work Plan Updated 4\_2016

<b>CUSTOMER THEME: CUSTOMER CENTERED</b>			
<b>OBJECTIVE A: NURTURE COMMUNITY CONNECTIONS</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Create process for reviewing existing and potential partnerships according to established criteria (Mid- and long-term)</b>			
Tactic a. Define types of partnerships and conduct research on partnership assessment tools	2014-15	In Progress	Administration
Tactic b. Create assessment tool and process	2015-16	In Progress	Administration
Tactic c. Pilot new assessment tool	2017		Administration
<b>Initiative Two: Develop, nurture and evaluate existing affiliate and partnerships (Continuous)</b>			
Tactic a. Develop an inventory of existing partnerships	2015-16	In Progress	Administration
Tactic b. Work with partners on agreements requiring updating	2013-17	In Progress	Administration
<b>Initiative Three: Develop and identify new opportunities based on Strategic Plan, Program Plan and facility needs (Mid- and long-term)</b>			
Tactic a. Pursue opportunities to nurture community connections identified in the programming plan process	2014-15	Completed	Rec, Ent., P&F
Tactic b. Evaluate opportunities for shared volunteer base and recruitment among community non-profits	2015-16	Completed	Marketing & Comm
Tactic c. Identify new local partnerships for athletic field/facility usage as part of the Indoor Sports Facility Study	2016-17		Administration
<b>OBJECTIVE B: IMPROVE CUSTOMER EXPERIENCE</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Create a cross-departmental team to analyze and develop a customer service plan, including a training and measurement plan (Short- and long-term)</b>			
Tactic a. Define a customer service vision and standards for all levels of the agency	2013-14	Completed	Marketing & Comm
Tactic b. Develop and implement customer service training	Deferred		Marketing & Comm
Tactic c. Develop and implement system-wide customer service measurement system	Deferred		Marketing & Comm
Tactic d. Research and evaluate options and related software to gather, track, and report customer feedback	2016-17		Marketing & Comm/IT
<b>Initiative Two: Enhance and develop technological solutions to communicate with customers to provide greater access and communication (Short-term)</b>			
Tactic a. Evaluate what technologies the District uses for communicating and reporting information and which technologies the District should continue to use or add in the future	2013	Completed	Marketing & Comm
Tactic b. Implement newly emerging technologies	2014	Completed	Marketing & Comm
Tactic c. Continue to evaluate e-communication platforms, including goal and measurement for each one	2014	Completed	Marketing & Comm

Status Color Highlight Key - Completed in **Yellow**; In Progress in **Green**; Future Year in **Blue**; Deferred to Future Strategic Plan in **Purple**

## 2016 Strategic Work Plan Updated 4\_2016

<b>OBJECTIVE C: OPTIMIZE PROGRAM AND FACILITY MIX</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Develop a District Program Plan (Short- and mid-term)</b>			
Tactic a. Determine process to comprehensively assess the District's program portfolio to determine a strategy for long-term sustainability	2013-14	Completed	Administration
Tactic b. Form cross-department team and provide training to conduct this assessment	2013-14	Completed	Administration
Tactic c. Conduct this assessment and create action plan	2013-14	Completed	Administration
Tactic d. Collaborate District-wide to optimize program offerings	2014-15	Completed	Program Departments
Tactic e. Identify methods to engage underserved populations	2014-15	Completed	Program Departments
Tactic f. Develop an annual review to evaluate program/service offerings according to needs assessment results and make adjustments to services as needed	2014-15	Completed	Administration
<b>Initiative Two: Develop a process to best position core services in the marketplace (Mid-term)</b>			
Tactic a. Identify core services and best practice approaches	2014	Completed	Administration
Tactic b. Evaluate core services	2014-15	Completed	Administration
Tactic c. Based on the results of b. above, maintain, improve and/or divest services for future sustainability	2015	Completed	Service Departments
<b>Initiative Three: Create a process for review of the external market to determine duplication, opportunities, needs, pricings, etc. (Mid-term)</b>			
Tactic a. Review the external market as part of the program planning and core services review processes	2014-15	Completed	Administration
Tactic b. Develop business plans for core programs, services and facilities based on results of tactic a. above	2015	Completed	Administration
<b>Initiative Four: Optimize Current and Future Facility Space (Continuous)</b>			
Tactic a. Assess/review facility usage needs based on program and core service plans, Indoor Facility Study and Long-range Capital Plan	2014-17	In Progress	Facility & Rec Departments
Tactic b. Conduct Indoor Sports Facility Market Demand and Financial Feasibility Study with the City of Elmhurst	2015-17	In Progress	Administration
Tactic c. Evaluate options and negotiate with the City of Elmhurst concerning its request to utilize multiple park properties for stormwater retention	2013-17	In Progress	Administration
Tactic d. Update Comprehensive Plan, including gathering feedback from community (e.g. public meetings, survey)	2016-17		Administration

Status Color Highlight Key - Completed in **Yellow**; In Progress in **Green**; Future Year in **Blue**; Deferred to Future Strategic Plan in **Purple**

## 2016 Strategic Work Plan Updated 4\_2016

<b>FINANCIAL THEME: FISCAL AGILITY</b>			
<b>OBJECTIVE A: ALIGN RESOURCES WITH COMMUNITY NEED</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Improve the capital project review and development process (Short-term)</b>			
Tactic a. Review the project evaluation process, including the criteria ranking and determining the rate of return of future capital projects	2013	Completed	Administration
Tactic b. Implement the process improvements developed in a. above	2013-14	Completed	Administration
<b>Initiative Two: Develop a consistent approach to the pricing of services (Mid-term)</b>			
Tactic a. Research elasticity of pricing and services to understand customer pricing threshold	2014-15	Completed	Marketing & Comm
Tactic b. Establish a consistent fee structure based on program plan/service analysis outcomes	2014-15	Completed	F&HR, ENT, REC, P&F, M&C, GC
Tactic c. Review and update revenue/expense policies	2015-17	In Progress	Administration
<b>Initiative Three: Ensure transparency by communicating ethics and values to community and internally (Continuous)</b>			
Tactic a. Develop an education process to enhance understanding of the District's ethics, values and financial policies and practices	2014-15	Completed	Marketing & Comm
Tactic b. Communicate the District's ethics, values and financial policies and practices	2013-17	In Progress	Marketing & Comm
Tactic c. Gather feedback on the effectiveness of communications and education process in the District's community-wide survey	2016		Marketing & Comm
<b>OBJECTIVE B: TAKE CARE OF WHAT WE HAVE</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Based on the priorities outlined in District planning documents, maintain the District's infrastructure to continue to support high quality offerings (Continuous)</b>			
Tactic a. Based upon the District's long-range financial plan, develop a comprehensive funding plan for financing the highest/high priority projects in the Capital Plan	2013-17	In Progress	Administration
Tactic b. Implement the highest/high priority projects in the Capital Plan	2013-17	In Progress	Administration
<b>Initiative Two: Create a comprehensive asset management plan that is linked to Capital Plan (Deferred)</b>			
Tactic a. Determine scope, goals and work plan	Deferred		Administration
Tactic b. Conduct RFP process to retain consultant to assist with development of plan	Deferred		Administration
Tactic c. Develop plan and integrate it into Capital Plan	Deferred		Administration
Tactic d. Create ongoing process to update and monitor plan	Deferred		Administration

Status Color Highlight Key - Completed in Yellow; In Progress in Green; Future Year in Blue; Deferred to Future Strategic Plan in Purple

## 2016 Strategic Work Plan Updated 4\_2016

<b>OBJECTIVE C: INVEST IN THE FUTURE</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Seek opportunities that will positively impact the District's finances (Continuous)</b>			
Tactic a. Explore new or expand programs and facilities/amenities to improve and maintain cost recovery goals	2014-17	In Progress	P&F, ENT, REC
Tactic b. Continue to seek outside financial support	2014-17	In Progress	Administration, M&C
Tactic c. Evaluate and improve retention strategies and programs	2015-16	In Progress	P&F, ENT, REC, SC, M&C
Tactic d. Attract non-users for select District services and programs	2014-15	Completed	P&F, ENT, REC, SC
<b>Initiative Two: Develop, implement and track cost recovery goals (Mid- and long-term)</b>			
Tactic a. Establish a cost recovery/subsidy allocation strategy that identifies what services/programs to subsidize and at what level (for recreation and enterprise programs)	2014-15	Completed	Administration
Tactic b. Enhance internal cost accounting practices for cost recovery tracking and reporting	2016-17		Finance & HR
Tactic c. Track cost recovery goals	2016-17		P&F, ENT, REC, SC

<b>INTERNAL BUSINESS THEME: IMPROVEMENT THROUGH COLLABORATION AND INNOVATION</b>			
<b>OBJECTIVE A: CREATE A BORDERLESS ORGANIZATION</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Conduct methods to gather internal customer feedback and improve internal business performance (Deferred)</b>			
Tactic a. Develop and implement internal customer survey	Deferred		HR/M&C
Tactic b. Evaluate survey findings and develop and modify policies, procedures and practices based on feedback	Deferred		HR/M&C
<b>Initiative Two: Evaluate and implement opportunities for employees to collaborate (Continuous)</b>			
Tactic a. Implement cross-functional teams that address Strategic Plan initiatives	2013-17	In Progress	Administration
Tactic b. Create cross-functional teams that foster interaction and involve all levels of the organization	2015-17	In Progress	Administration
<b>Initiative Three: Evaluate and enhance communication among District employees (Continuous)</b>			
Tactic a. Review all communication vehicles and research how employees would prefer information (full- and part-time)	2013	Completed	Finance & HR
Tactic b. Investigate and implement, where appropriate, innovative methods/tools for employee communication	2013-15	Completed	Finance & HR
Tactic c. Survey employees to evaluate effectiveness of ongoing and new communication vehicles	2015	Completed	Finance & HR

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## 2016 Strategic Work Plan Updated 4\_2016

<b>OBJECTIVE B: EXCELLENCE IN INNOVATIVE OPERATIONAL MANAGEMENT</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Complete a work analysis/staffing review to determine the best allocation of labor dollars (Mid- and long-term)</b>			
Tactic a. Determine scope of review	2014	Completed	Finance & HR
Tactic b. Conduct RFP process to retain consultant to assist with review	2014	Completed	Finance & HR
Tactic c. Conduct review	2014-15	Completed	Finance & HR
Tactic d. Assess the feasibility of and implement recommendations	2015-17	In Progress	Finance & HR
Tactic e. Conduct compensation study	2016		Finance & HR
<b>Initiative Two: Develop a dashboard of key indicators to assess and improve organizational performance (Long-term)</b>			
Tactic a. Develop indicators and determine performance targets	2015-16	In Progress	Administration
Tactic b. Begin tracking and reporting outcomes and next steps if targets are not met	2015-17	In Progress	Administration
Tactic c. Research and implement technology that will support tracking and reporting indicators on dashboard software	2016-17		Administration/IT
<b>Initiative Three: Institutionalize sustainable internal operations (Continuous)</b>			
Tactic a. Review the mission, purpose and structure of the employee Environmental Committee and how the District identifies and implements sustainable practices	2013-14	Completed	Green Team
Tactic b. Utilize green building products and technologies in building and site development projects where applicable and feasible	2013-15	Completed	P&F, ENT, GC
Tactic c. Create action plan for addressing deficient areas of IPRA Environmental Report Card	2015-16	In Progress	Green Team
<b>Initiative Four: Utilize and improve technology for efficiency and reporting (Continuous)</b>			
Tactic a. Implement Strategic Technology Plan priorities	2014-17	In Progress	IT
Tactic b. Evaluate options and implement new registration software	2014-16	In Progress	Finance & HR

## LEARNING AND GROWTH THEME: CONTINUOUS IMPROVEMENT THROUGH AN EMPOWERED TEAM

### OBJECTIVE A: DEVELOP AN EMPOWERED STAFF

<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Strengthen District training to facilitate the empowerment of staff (Long-term)</b>			
Tactic a. Evaluate current practices	2015-16	In Progress	Finance & HR
Tactic b. Develop and implement plan of action based on outcomes of tactic a. above	2016		Finance & HR
<b>Initiative Two: Develop leaders (Long-term)</b>			
Tactic a. Develop competencies	2015-16	In Progress	Administration
Tactic b. Create and implement training program	2016		Administration
Tactic c. Test effectiveness and provide support to new leaders	2016-17		Administration



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<b>OBJECTIVE B: CREATE A CULTURE OF CONTINUOUS IMPROVEMENT</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Consider a Board assessment process to continuously improve Board governance (Long-term)</b>			
Tactic a. Determine assessment process	2015	Completed	Administration
Tactic b. Conduct assessment process	2016	Completed	Administration
Tactic c. Implement recommended outcomes of process	2016		Administration
Tactic d. Transfer knowledge between outgoing and incoming Board members	2017		Administration
<b>Initiative Two: Formalize a process for management of organizational knowledge (Deferred)</b>			
Tactic a. Collect and transfer workforce knowledge	Deferred		Administration
Tactic b. Document and share best practices within the District	Deferred		Administration
<b>OBJECTIVE C: FOSTER A CULTURE OF INNOVATION</b>			
<b>Initiatives and Tactics</b>	<b>Timeline</b>	<b>Status</b>	<b>Lead Dept.</b>
<b>Initiative One: Research industry trends and identify ways of integrating new ideas into programs, facilities and services (Long-term)</b>			
Tactic a. Conduct bi-annual service/program/facility analysis trainings specifically designed to discuss the macro operating environment, including social and demographic, technological, economic and political trends	2017		Administration
Tactic b. Integrate trend analysis review into the budget, capital, work plan development and program/service analysis processes	2017		Administration
<b>Initiative Two: Establish organizational systems to promote innovation (Long-term)</b>			
Tactic a. Review employee reward and recognition systems	2017		Administration
Tactic b. Review full-time employee performance appraisal process	2016		Administration

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